



Qlik Basics

Qlik Reporting Basics

[Link to accompanying video](#)

Information and instructions included in this document apply universally to all apps and reports in the new Qlik reporting tool.

Use this link to learn about the individual Qlik apps and which Microstrategy reports they contain:

https://link.kohls.com/media/digital/k-link/downloads/pdf/Microstrategy_Report_to_Qlik_App_Mapping.pdf

In this section we will:

- Review the Qlik vendor reporting homepage
- Learn how to open Qlik apps
- Learn how to open sheets in a Qlik app
- Explore data on a sheet in a Qlik app by learning how to:
 - Scrolling through tables
 - Selecting different views embedded in the sheet
 - Changing filters and selections
 - Export data into the xlsx file format (Excel)
- Learn how to exit the current app and return to the Qlik homepage

Qlik Vendor Reporting Homepage

The Qlik vendor reporting home page hosts four Qlik apps:

1. Vendor Style Summary - All Versions
2. Vendor Totals by Department
3. Vendor Weekly Business Summary
4. Vendor SKU-STR Data Export - (limited availability)

The Qlik App

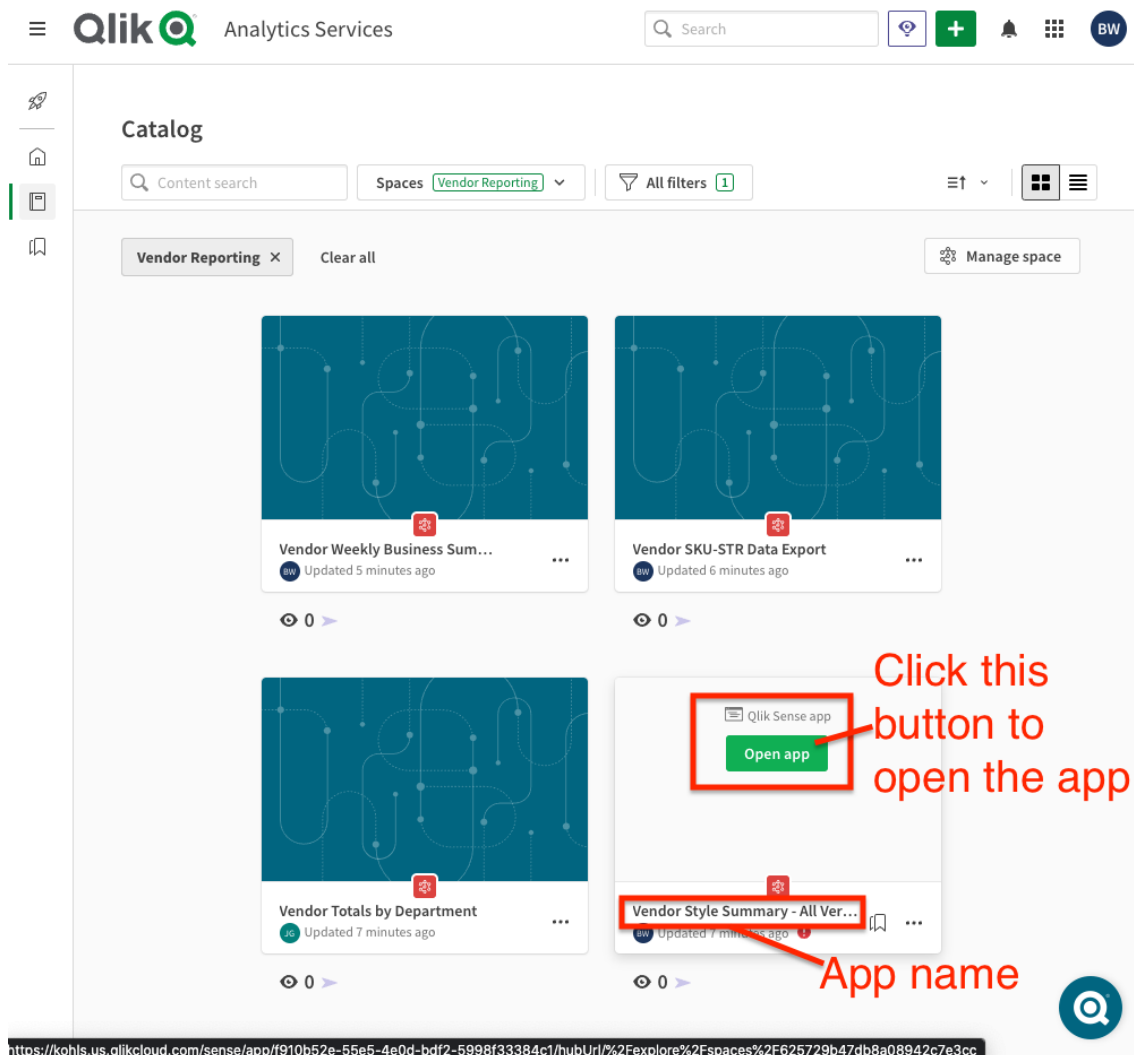
Qlik apps contain a dedicated slice of data for a specific set of use cases. Apps are distinct and not connected. Data in one app may or may not be seen in other apps. Data can be exported out of Qlik to Excel files, too. Let's explore one of the apps available to vendors to understand how it works.

Notes:

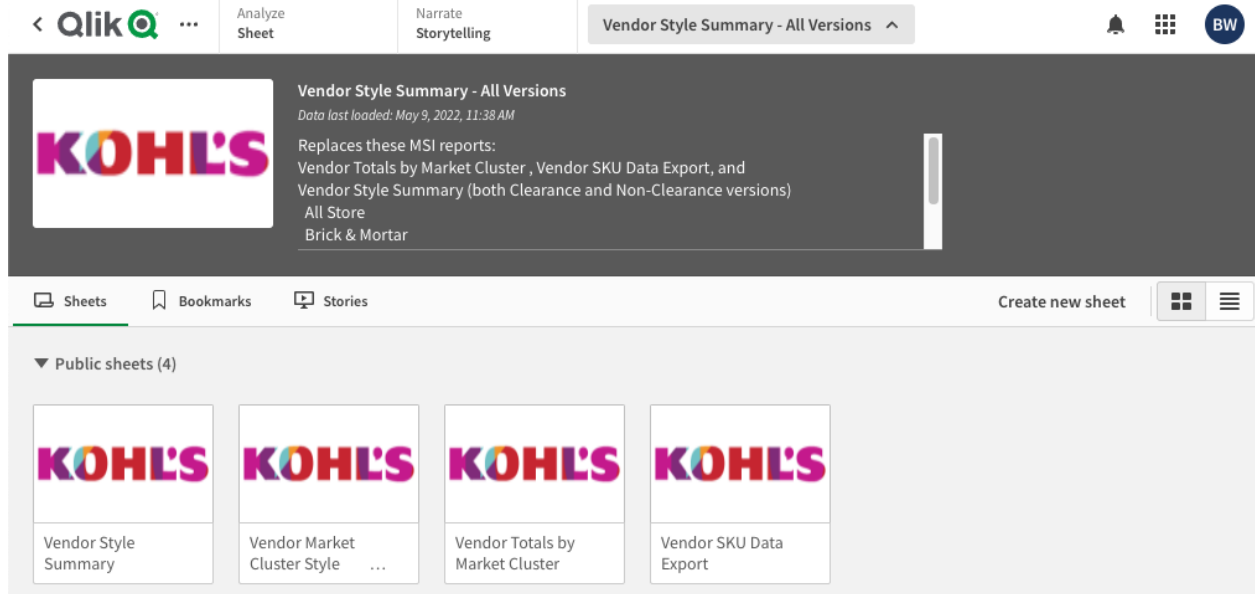
1. These instructions included below apply to every application and dataset within Qlik.
2. The data shown in images below is fictitious.

Open an App

1. Hover your mouse over the app titled *Vendor Style Summary - All Versions*
2. Click the green "Open App" button that appears
 - a. This is a large app and may take a while to load



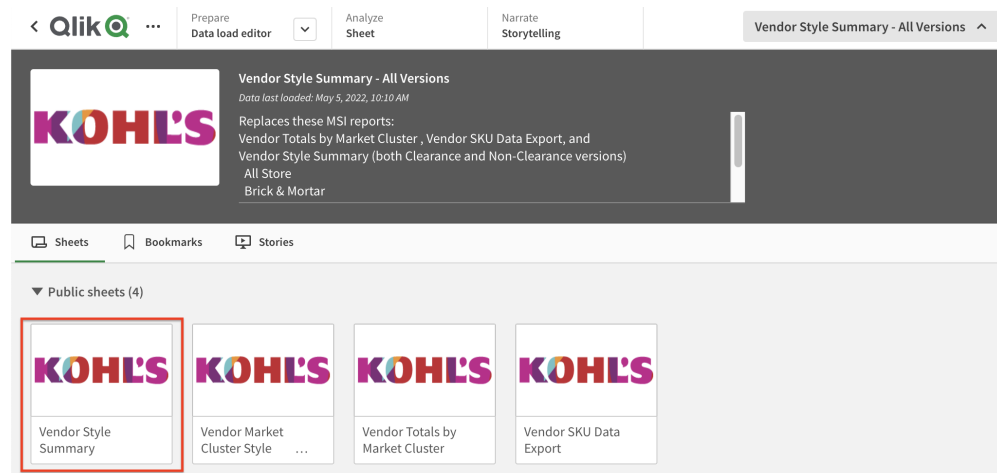
3. This is the App Overview and you should see four sheets:
 - a. Vendor Style Summary
 - b. Vendor Market Cluster Style Summary
 - c. Vendor Totals by Market Cluster
 - d. Vendor SKU Data Export



Open a Sheet & Explore

Every Qlik app has sheets that display data. Let's open up a sheet & explore.

1. Click the first sheet titled *Vendor Style Summary*



2. Scroll through the data by using the scroll bars located on the bottom and right side.
3. Review the current filters at the top of the screen in the selections bar.
 - a. Click on the selection boxes to see all available as well as currently selected values.
 - b. Green is selected, light gray is available as selection, dark gray is not available as a selection.
4. Click on any of the Quick Filter Buttons to update the selections in the Selections Bar

5. Some sheets may have tabs, very similar to the tabs in an Excel workbook. Here we have two tabs, "Report" and "Grid". Click on each one to change your view of the data:

Export Data to an Excel File

1. Right click any chart, table, or dataset you see on a sheet.
2. When you see options such as “Container” and “Pivot table”, select “Pivot table” to see the next menu:

Vendor Style Summary
Date last loaded: May 9, 2022, 1:06 PM

Report Grid
SKU Status Description: ACTIVE, DISCONTINUED Vendor Name: KOHL'S CAFE
All values thru week ending 05/07/2022

Vendor Name	Department	Major Class	Subclass	Vendor Style N...	Vendor Style De...	Group Code	Values
KOHL'S CAFE	984 - KOHL'S CAFE	10 - DRINKS	Totals	15 - ALSO AVAILABLE	DECAF	DECAF	-534 (\$220)
			Totals	ICED	ICED		-387 \$0
			Totals	NON-FAT MILK	NON-FAT MILK		-30 \$0
			Totals	16 - NON COFFEE DRINKS	DIET COKE		-249 \$0
				CCB2703	DIET COKE		-108 \$0
				CCB2707	COCA COLA		-147 (\$220)
				CCB2721	SPRITE		-116 (\$31)
				PEP00129	PEPSI		-8 (\$22)
				PEP00130	DIET PEPSI		-18 (\$46)
				PEP00134	MOUNTAIN DEW		-22 (\$39)
				PEP54554	AQUAFINA		-52 (\$48)
				PEP54554	DIET MOUNTAIN DEW		-0 (\$3)
				PER11645421	PERRIER SPARKLING MINERAL WATE		0 \$0

Click “Pivot table” to see the next menu

3. Click the “Download” button at the bottom:

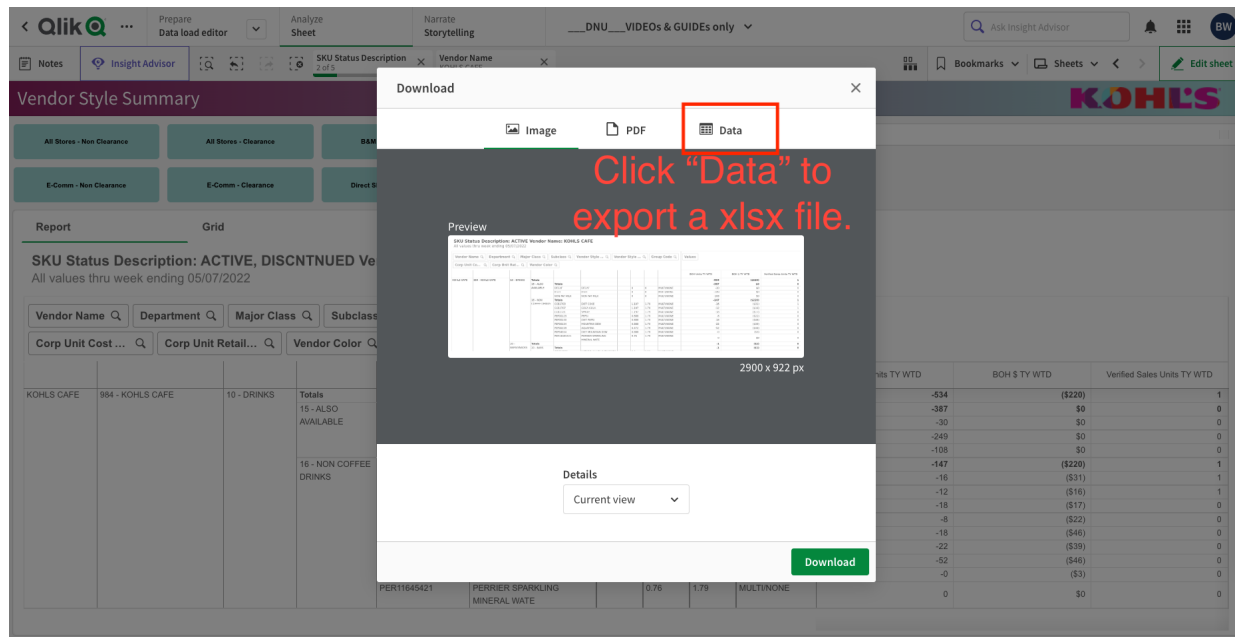
Vendor Style Summary
Date last loaded: 5/9/2022 6:06:08 PM

Report Grid
SKU Status Description: ACTIVE, DISCONTINUED Vendor Name: KOHL'S CAFE
All values thru week ending 05/07/2022

Vendor Name	Department	Major Class	Subclass	Vendor Style N...	Vendor Style De...	Group Code	Values
KOHL'S CAFE	984 - KOHL'S CAFE	10 - DRINKS	Totals	15 - ALSO AVAILABLE	DECAF	DECAF	-534 (\$220)
			Totals	ICED	ICED		-387 \$0
			Totals	NON-FAT MILK	NON-FAT MILK		-30 \$0
			Totals	16 - NON COFFEE DRINKS	DIET COKE		-249 \$0
				CCB2703	DIET COKE		-108 \$0
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				PEP54554	AQUAFINA		-52 (\$48)
				PEP54554	DIET MOUNTAIN DEW		-0 (\$3)
				PER11645421	PERRIER SPARKLING MINERAL WATE		0 \$0

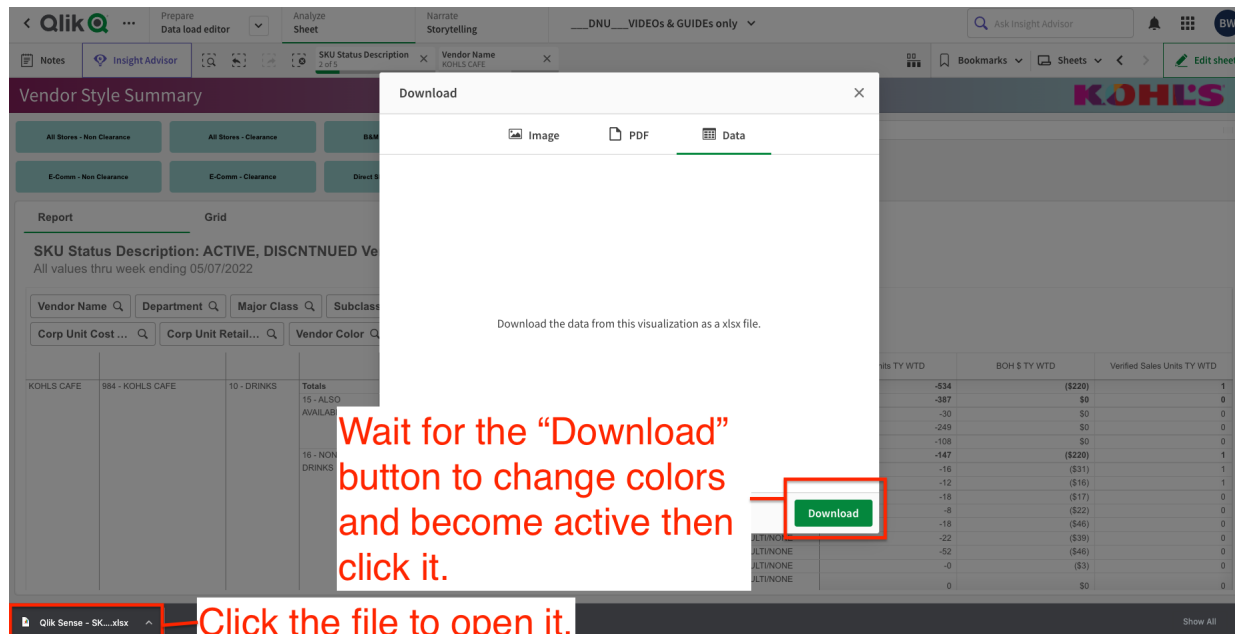
Click “Download”

4. Wait for this window to load then click “Data” to open the appropriate panel:



5. Wait for the “Download” button to change colors and become active then click the button to download your data to an xlsx file.

- Some browsers may require you to click a save button before the file downloads. The image below and accompanying video were captured in Google Chrome which does not have a prompt to save.
- Once the file is downloaded, click to open it.



Retrieve additional historical data

1. Due to data volumes the amount of historical data available within a given app is limited. To help provide better experience the capability to retrieve historical data has been added. This option will appear at the bottom of the page where applicable.

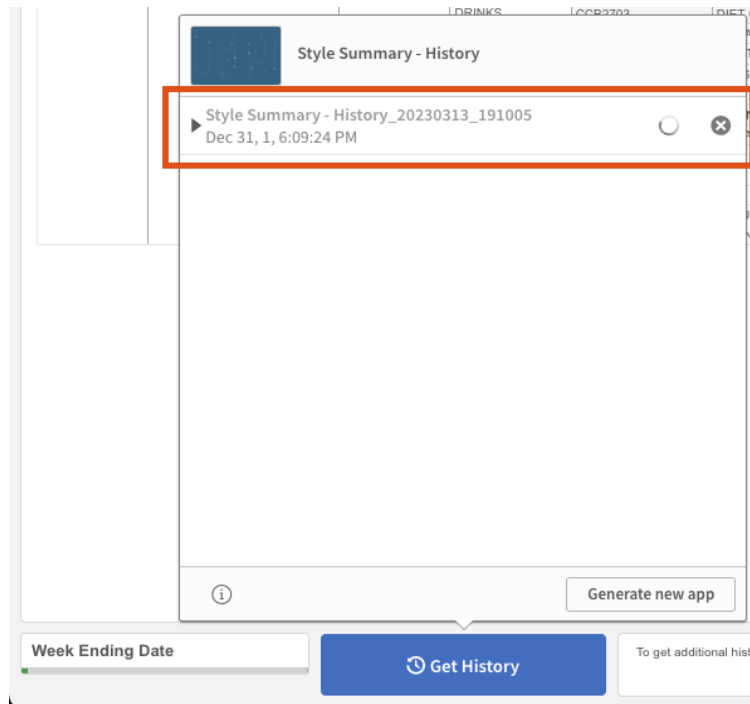
Select a Week Ending Date
Then click the "Get History" button

2. Make a selection for the desired historical data week. Only **one (1)** week may be chosen at a time. If multiple weeks or no weeks are selected you will not be able to generate the historical app.

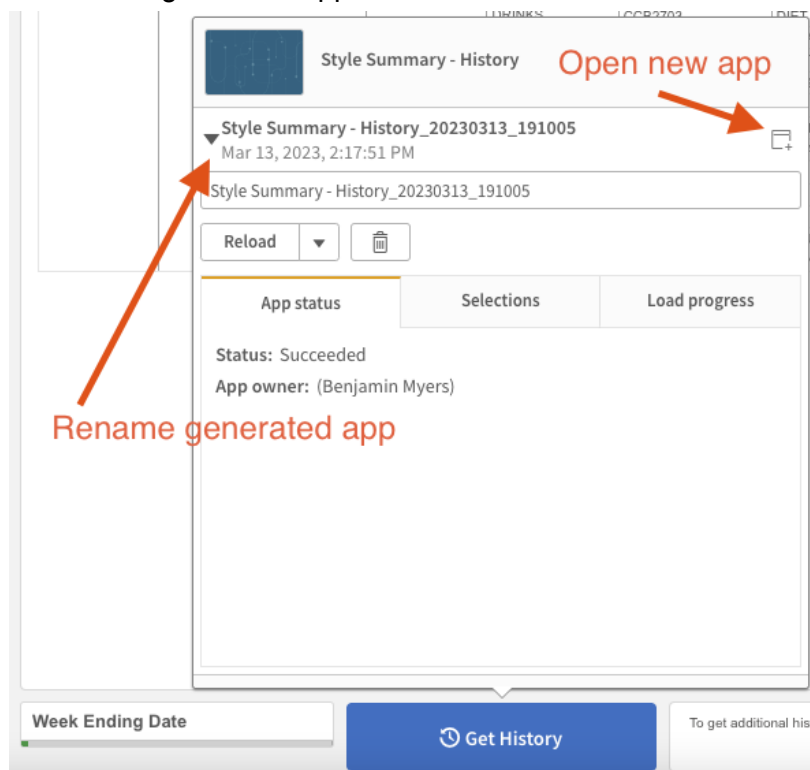
Click the "Generate new app" button

Disabled due to invalid Week Ending Date selection

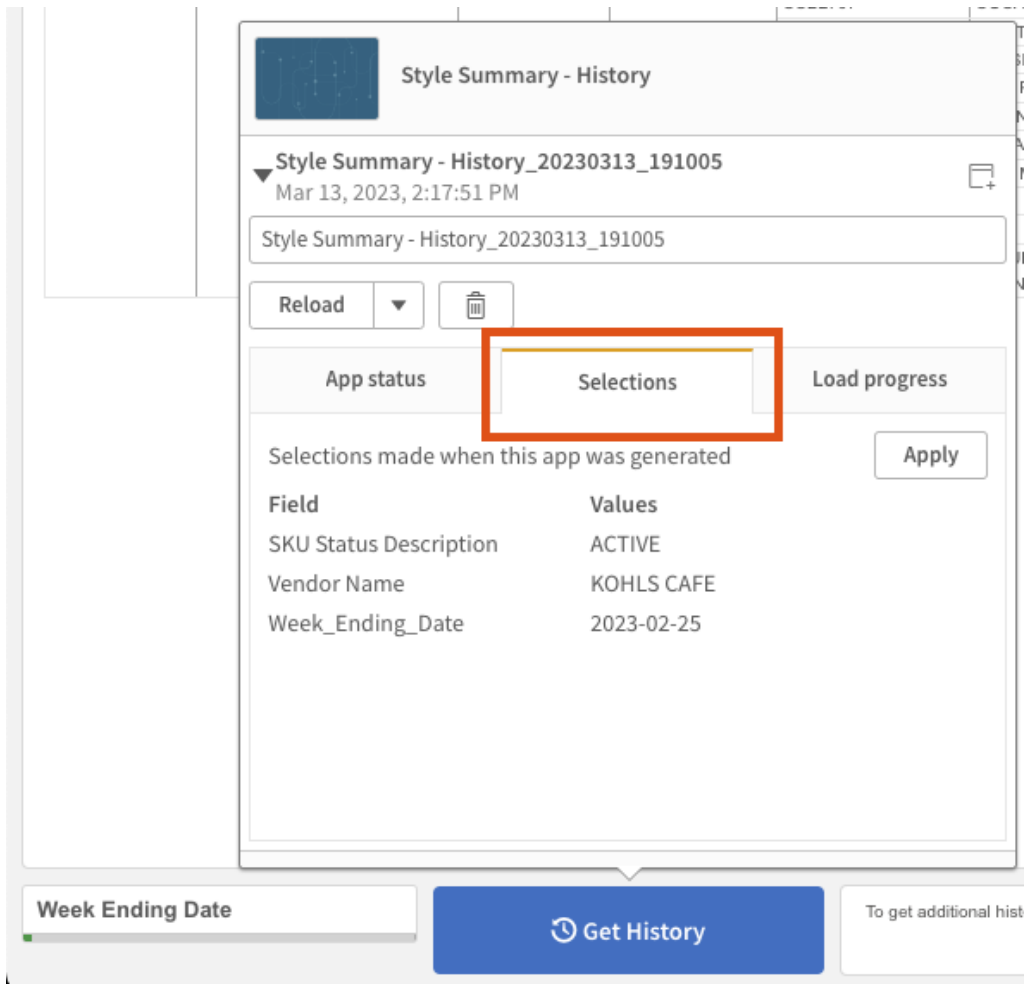
- Once the historical app generation has been started the current status will be shown. Any previous historical apps generated will also be shown here. Historical app generation may take 10 minutes or more.



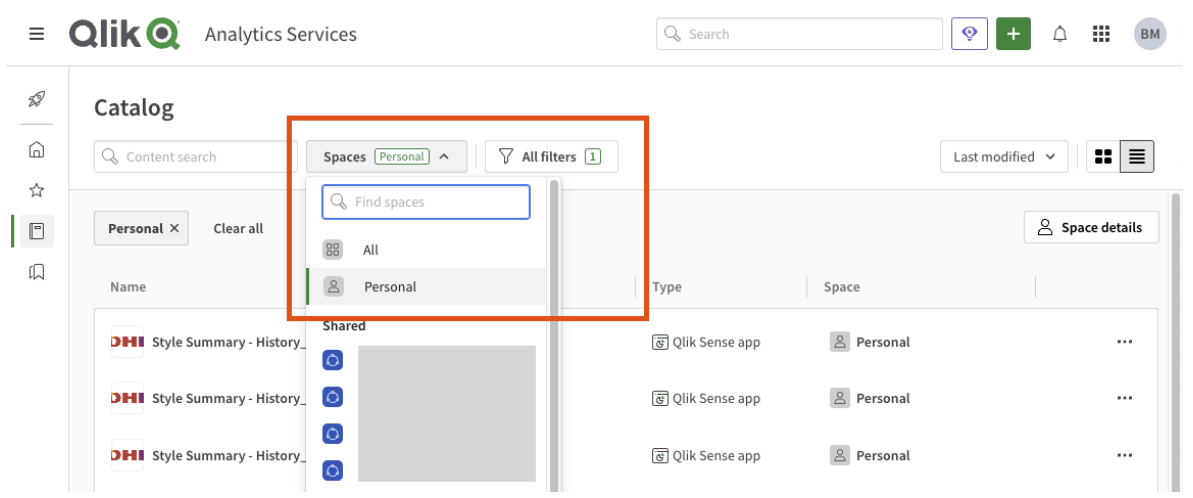
- Once completed a button will appear on the right to open the new app. If desired click the small black arrow next to the timestamp to expand the details and rename the generated app.



- 5. Generated applications will automatically be deleted after **seven (7)** days and up to **five (5)** apps may be generated at a time. The selections tab on the expanded details will show the selections used to generate the



- 6. Generated applications can also be viewed from your Personal section from the Vendor Reporting homepage.



Return to App Overview

From any sheet in an app, click the “...” next to the Qlik icon to access a menu that allows you to return to the app overview:

The screenshot shows the Qlik interface with a menu open. The menu is triggered by clicking the three dots next to the Qlik icon in the top left. The menu options are:

- App overview
- Subscribe to sheet
- Download sheet as PDF
- Duplicate sheet
- Make sheet private
- Embed sheet
- Touch screen mode

The background shows a dashboard for 'Vendor Name: KOHLS CAFE' with a table of data. The table has columns: Vendor Name, Department, Major Class, Subclass, Vendor Style Number, and Vendor Style Description. The data includes various items like DECAF, ICED, NON-FAT MILK, DIET COKE, COCA COLA, SPRITE, PEPSI, DIET PEPSI, MOUNTAIN DEW, AQUAFINA, DIET MOUNTAIN DEW, PERRIER SPARKLING MINERAL, NATURE VALLEY OAT/HONEY C, and LAYS POTATO CHIPS LSS.

Return to the Qlik Homepage

Use your browser’s back button to return to the home page. Here is an example of the back button in Google Chrome:

The screenshot shows the same Qlik interface as above, but with a red arrow pointing to the back button in the browser's address bar. The text next to the arrow says: "Use your browser's back button to return to the Qlik home page."