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qlikview step by step tutorial

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QlikView Step by Step Tutorial: From Installation to Insightful Dashboards

In the world of data analytics, turning raw numbers into actionable insights is essential for business success. QlikView, a powerful business intelligence (BI) platform, excels at providing interactive dashboards, robust data modeling, and real-time analytics. Whether you're a data analyst, a business user, or an IT professional, mastering QlikView can elevate your reporting capabilities and drive smarter decisions. This comprehensive guide offers a step by step tutorial that walks you through every stage—from installing QlikView to creating dynamic visualizations and sharing your findings with stakeholders.

Why Choose QlikView?

Before diving into the tutorial, let's explore why QlikView remains a popular choice among organizations worldwide:

- Associative Engine: QlikView's in memory data model lets users explore data freely, revealing hidden relationships.
- Speed: Rapid query performance enables instant data refreshes and real time insights.
- Flexibility: From simple charts to complex calculations, QlikView supports a wide array of visualizations.
- Scalability: Seamlessly handles small datasets or enterprise level data warehouses.
- Security: Granular user permissions and data protection features ensure compliance.

With these advantages in mind, let's begin our QlikView step by step tutorial.

Step 1: Installing QlikView

System Requirements

Before you install QlikView, confirm that your machine meets the minimum system requirements:

- Operating System: Windows 10/11 or Windows Server 2016/2019.
- Processor: 2 /GHz or faster.
- RAM: 4 /GB minimum (8 /GB recommended for larger datasets).
- Disk Space: 1 /GB free for the installer; additional space for data.
- Display: 1280 /× /800 resolution.

Downloading the Installer

Navigate to the official Qlik website, locate the QlikView download page, and choose the appropriate version for your operating system. Create a Qlik account if prompted; this will enable you to receive updates and access community resources.

Running the Setup

1. Double click the downloaded installer (.exe) file.
2. Accept the license agreement and click Next.
3. Select the installation folder or accept the default path.
4. Choose the components you want to install—typically QlikView Desktop and QlikView Server if you plan to publish apps.

5. Click Install and wait for the process to complete.
6. When prompted, restart your computer to finalize the installation.

Launching QlikView

After restarting, open the QlikView icon from your Start menu. The first launch will prompt you to create a new QlikView document. For this tutorial, select **New QlikView Document** to begin.

Step 2: Understanding the QlikView Interface

The Main Window

When you open a new document, the QlikView interface consists of several key areas:

- Menu Bar: Access tools, file operations, and settings.
- Toolbar: Quick actions such as saving, opening, and publishing.
- Script Editor: Write and edit data load scripts.
- Layout Designer: Drag and drop objects to build your dashboard.
- Object Properties: Configure settings for charts, tables, and text objects.

Key Concepts

Familiarizing yourself with QlikView's terminology will streamline the learning process:

- Data Load Script: The code that extracts, transforms, and loads data into QlikView's in memory engine.
- Objects: Visual components such as bar charts, line charts, tables, and text boxes.
- Expressions: Formulas that calculate values or filter data within objects.
- Selections: Interactive filters applied by users on the dashboard.

Step 3: Loading Your First Dataset

Choosing a Data Source

For this tutorial, we'll use the publicly available **Sample Sales**dataset, which includes sales transactions, product details, and customer information. The dataset can be downloaded as an Excel file from the Qlik community portal.

Writing the Load Script

1. Open the Script Editor by clicking File > Edit Script.
2. Replace the placeholder script with the following code:

```
// Load Sales Transactions
Sales:
LOAD
    SalesID,
    OrderDate,
    CustomerID,
    ProductID,
    Quantity,
    UnitPrice,
    TotalPrice
FROM [lib://SampleData/Sales.xlsx]
(ooxml, embedded labels, table is [Sales]);
```

```
// Load Customers
Customers:
LOAD
    CustomerID,
    CustomerName,
    Region,
    Segment
FROM [lib://SampleData/Customers.xlsx]
(ooxml, embedded labels, table is [Customers]);

// Load Products
Products:
LOAD
    ProductID,
    ProductName,
    Category,
    SubCategory,
    Price
FROM [lib://SampleData/Products.xlsx]
(ooxml, embedded labels, table is [Products]);

// Create a calculated field for Sales Amount
Sales:
LOAD
    *,
    Quantity * UnitPrice AS SalesAmount
RESIDENT Sales;
```

Click **Save** and then **Reload** to execute the script. QlikView will import the data into its memory engine, creating tables named **Sales**, **Customers**, and **Products**.

Verifying Data Load

Once reloading completes, open the **Data Manager** by selecting **File > Data Manager**. Here, you can inspect the tables, view field names, and ensure relationships are correctly established. QlikView automatically creates associative links based on matching field names—such as **CustomerID** and **ProductID**.

Step 4: Building a Basic Dashboard

Adding a Chart

1. Switch to the Layout Designer view.
2. Drag a Bar Chart object from the toolbar onto the canvas.
3. Double click the chart to open its properties.
4. Under Expressions, click Add and enter the following expression:

```
Sum(SalesAmount)
```

Set the **Dimension** to **Region** so the chart displays total sales per region.

Adding a Table

1. Drag a Table Object onto the canvas.
2. In the properties, add dimensions: CustomerName, ProductName, and OrderDate.
3. Add the expression Sum(SalesAmount) as a measure.
4. Format the table by setting column headers and applying a color scheme.

Incorporating Text Objects

Use text objects to add titles, captions, or explanatory notes. Drag a **Text & Image** object, then type:

Adjust font size and style in the properties panel to match your design preferences.

Step 5: Enhancing Interactivity

Creating Selections

QlikView's associative engine allows users to filter data by clicking on any chart or table element. For example, clicking on a particular region in the bar chart will automatically filter the table to show only sales from that region.

Adding a Selection Box

1. Drag a Selection Box onto the canvas.
2. Set its Field to Category.
3. Enable Multi Select to allow users to choose multiple categories simultaneously.

Implementing a Date Picker

To filter sales by date range, use a **Date Picker** object:

1. Drag the Date Picker onto the canvas.
2. Set the Field to OrderDate.
3. Configure the picker to show a calendar view.

Step 6: Advanced Data Modeling

Creating Joins

Although QlikView automatically links tables based on field names, you might need explicit joins for complex scenarios:

```
JOIN (Sales)
LOAD
   CustomerID,
   CustomerName
RESIDENT Customers;
```

Using Prefixes to Resolve Ambiguity

If two tables contain a field with the same name but different meanings, prefix the field in the load script:

LOAD

```
    OrderDate AS SaleDate,
    ...
FROM ...
```

Aggregating Data in the Script

Pre aggregating data can improve performance. For example, calculate total sales per product before loading into the dashboard:

```
ProductSales:
LOAD
    ProductID,
    Sum(SalesAmount) AS TotalSales
RESIDENT Sales
GROUP BY ProductID;
```

Step 7: Applying Conditional Formatting

Highlighting High Performing Products

1. Open the Bar Chart properties.
2. Navigate to Colors & Styles.
3. Enable Color by Expression and enter:

```
If(Sum(SalesAmount) &gt; 50000, RGB(0,255,0), RGB(255,0,0))
```

This expression colors bars green if sales exceed 50,000 and red otherwise.

Using Thresholds in Tables

In a table, you can apply background colors to cells based on values. In the **Expressions** tab, add a **Color** expression:

```
Color: If(Sum(SalesAmount) &gt; 10000, RGB(0,255,0), RGB(255,0,0))
```

Step 8: Publishing Your QlikView App

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