EDUCATION

Qlikview End User Guide

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Introduction to the QlikView End User Guide

QlikView is a powerful business intelligence (BI) platform that enables users to explore data on their own terms. Unlike traditional query-based tools, QlikView uses an associative data model that lets you navigate information freely. Whether you are a business analyst, a sales manager, or a marketer, mastering QlikView as an end user can dramatically improve your decision-making speed and accuracy. This **QlikView end user guide**is designed to help you get started, understand core features, and confidently interact with dashboards created by your QlikView developers.

In this comprehensive walkthrough, we will cover everything from the basic user interface to advanced selection techniques, exporting data, and best practices. By the end, you will be able to navigate any QlikView application, make meaningful selections, and extract the insights you need.

Getting Started with QlikView

Understanding the User Interface

When you open a QlikView document (a **.qvw**file), you are greeted with a clean, intuitive interface. The main components include:

- The Sheet Tab Bar – Allows you to switch between different sheets (views) within the app.
- List Boxes – Display a list of all distinct values in a field (e.g., Product, Region, Year).
- Chart Objects – Visual representations like bar charts, line graphs, scatter plots, and pivot tables.
- Multibox – A compact object that contains multiple fields, helping you make selections across different dimensions.
- Current Selections Bar – Shows all active selections and allows you to undo or clear them.

Take a moment to explore the sheets and objects. Every item is interactive – clicking on values in a list box or chart element will filter the entire app according to your selection.

Opening and Navigating a QlikView Application

Typically, a QlikView developer will share a **.qvw**file, or you may access it via a QlikView Server (QVS) in a web browser. If you are using the desktop client, simply double-click the file. For web access, open the link provided by your administrator and log in if required.

Once inside, you will see the sheet tab bar at the top. Clicking any tab loads that sheet's objects. Most applications begin with a **dashboard overview**sheet showing key performance indicators (KPIs), followed by detailed analytical sheets. Use the sheet names as a guide to find the analysis you need.

Making Selections – The Core of QlikView

How Selections Work

QlikView's associative engine means every selection instantly updates all other objects. For example, if you click on "West" in a Region list box, the entire app shows only data for that region – all charts, tables, and other list boxes become filtered. This is the heart of the **QlikView end user guide** experience: you explore by clicking.

Selection Methods

- Single Click: Select a single value (it becomes green). All other values become white (associated) or gray (unassociated).
- Ctrl + Click: Add another value to the selection (multiple values from the same list box).
- Shift + Click: Select a range of values (if the list is sorted).
- Lasso Selection: In charts like scatter plots, you can draw a lasso around points to select them.

Clearing and Reversing Selections

To undo a selection, click the same value again, or use the **Current Selections Bar** at the top of the sheet. Each active selection appears as a colored chip. You can:

- Click the X on a chip to remove that value.
- Click the Clear All button (X icon on the toolbar) to reset everything.
- Use Backspace to step backward through your last selections (undo).

Search Within List Boxes

When a list box contains many values (e.g., thousands of product names), use the search field at the top. Type any text, and QlikView filters the list in real time. You can then select one or more results using the usual click behavior.

Understanding Associative Search

A standout feature in QlikView is the **Associative Search** box (often accessible via a search icon or keyboard shortcut Ctrl+F). This search spans all fields and objects at once. For instance, if you type "2023" it immediately shows all records with that value across any field – even those not visible on the current sheet. You can then select any of these search hits, and the app filters accordingly. This is an incredibly fast way to locate specific data points.

Interacting with Visualizations

Charts and Graphs

Most QlikView applications contain various chart types. As an end user, you can:

- Hover over data points to see tooltip details.
- Click on a bar, pie slice, or line segment to make a selection in the underlying dimensions.
- Right-click to access object-specific options (e.g., export as image, copy to clipboard).
- Zoom or Pan in scatter plots and line charts if the developer enabled that.

Tables and Pivot Tables

In straight tables and pivots, you can:

- Sort by clicking column headers.
- Drag columns to reorder them (if allowed).
- Collapse or expand dimension levels in a pivot.
- Select one or multiple rows by clicking the leftmost cell.

Gauges and KPIs

These are summary indicators. Clicking on a gauge usually does nothing (it's a display-only object), but often

you can click on the label to drill into a more detailed sheet if the developer added a navigation action.

Using Bookmarks and Snapshots

Bookmarks

Bookmarks save the current selection state of the entire application. They are extremely useful for returning to a specific analysis. To create a bookmark:

1. Make the desired selections.
2. Click the Bookmark menu (or the bookmark icon on the toolbar).
3. Select Create Bookmark, give it a name, and click OK.
4. To apply a bookmark later, click the bookmark icon and choose it from the list.

Many developers also add pre-built bookmarks to sheets, which appear as buttons or links. Using bookmarks can save you minutes of re-navigation.

Snapshots

A snapshot captures a static image of a specific object (like a chart or table) with its current selections. You can take a snapshot by right-clicking an object and selecting **Snapshot**from the context menu. Snapshots can be exported to Excel, PowerPoint, or PDF, making them perfect for including in presentations.

Exporting Data from QlikView

Sometimes you need to analyze or share raw data outside of QlikView. The platform offers several export options:

- Export to Excel: Right-click a table or list box, choose Export > Excel (or CSV). The exported file includes only the data visible after your current selections.
- Export Chart as Image: Right-click a chart, select Export > Image (PNG, BMP, JPEG). High-quality for reports.
- Export to PDF: Some applications have a Print button. Alternatively, use the browser's print function if you are using QlikView Server.
- Copy to Clipboard: Select cells or rows in a table, press Ctrl+C, and paste into Excel or Word.

Always confirm with your developer that the data export complies with your organization's data governance policies.

Advanced Features for Power Users

Cyclic and Drill-Down Groups

These are predefined group objects that allow you to cycle through different dimensions without multiple list boxes. For example, a cyclic group might include Year, Quarter, and Month. Click the arrow button on the group to switch from Year to Quarter to Month. This is a compact way to change your view.

Set Analysis

While set analysis is typically used by developers, as an end user you may encounter objects that contain a **modifier**, such as a text box showing *"Sales for Top 10 Customers"*. These objects use set analysis to compute values based on a fixed condition, independent of your current selections. Interaction with such objects is usually limited to reading or perhaps clicking to drill.

Container Objects

Some QlikView applications use containers to hide multiple objects in the same space. You will see tabs within

a container sheet. Click each tab to reveal different charts or tables. This keeps the interface clean while offering depth.

Tips and Best Practices for QlikView End Users

- Always check the Current Selections Bar – before making conclusions, verify that you are not accidentally filtering data.
- Use the Associative Search – it's often faster than navigating multiple list boxes.
- Bookmark important views – especially if you give weekly reports; you can skip repeated manual selections.
- Understand gray vs. white – after a selection, values in white are associated with your selection; gray values are not present in the filtered data. Gray values can still be selected, but they will return zero or no records unless you change the selection logic (that's a more advanced concept called alternative states).
- Do not ignore the right-click menu – many hidden options (export, print, snapshot, copy) are there.
- Slow performance? – close other applications, clear unnecessary selections, or contact your developer if the app is too large.
- Keyboard shortcuts – learn a few: Ctrl+S (open search), Ctrl+Z (undo selection), Ctrl+B (clear all).

Common Troubleshooting Scenarios

Chart Appears Empty

If a chart shows no data, it likely means your current selections exclude all records for that chart's dimensions. Check the Current Selections Bar and clear one or more selections. It could also be a data loading issue – contact support if the problem persists.

List Box Values Are All Gray

Gray values are unassociated with your current selection. If you need to see them, either clear selections or make a different selection that connects them. Conversely, gray is useful to spot values that do not belong to your selected context.

Cannot Select a Chart Element

Developers can disable selections on certain charts. If the cursor does not change to a hand icon when hovering, selections are turned off. Look for other interactive objects

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qlikview-end-user-guide

DIGITAL EDITION

qlikview-end-user-guide

DIGITAL EDITION

qlikview-end-user-guide

DIGITAL EDITION

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