

View Sheet Details & Select a Sheet

1. Click the bottom of a thumbnail to see details about that particular sheet.
2. Click the top of the thumbnail to open it.



When you hover your mouse over the bottom of a sheet thumbnail, the Details icon  displays.

Search & Choose Selections from a field

1. From an open sheet, click the desired field.
2. Do *one* of the following:
 - Select a value from the list.
 - Type search text to narrow the list, and then select the value(s).
3. To select multiple values, click and drag your mouse over consecutive values or click each value.
 - To narrow your search, use the asterisk (*) wildcard character before and/or after your search text, e.g., *135*.
4. To remove a selected value, select it again.
5. Click the **Confirm selection** check mark.



*If you make a mistake, click the **Clear Selection**  button to remove the value and select a new one. Click **Cancel selection**  to cancel making a selection.*

Buttons

Button	Description
	Open About, Qlik help & other options.
	Move one step backward .
	Move one step forward .
	Clear all selections.
	Open Smart Search .
	Open the Selections tool .
 Bookmarks ▾	Create & manage bookmarks .
 Sheets ▾	Select a different sheet .
 Duplicate	Copy the sheet & customize in My sheet .
	Move back or forward one sheet.

Choose Selections from a Visualization

1. From an open sheet, click the visualization (or a specific selection in the visualization).
2. Select all the desired values.



To *select multiple values* at once, use the **Lasso**  option to draw a circle around the desired values (if available).

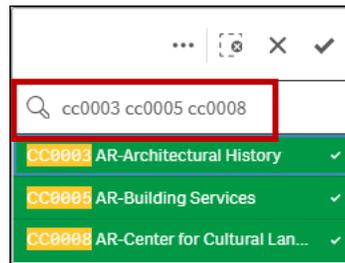


*If you make a mistake, click the **Clear Selection**  button to remove the value and choose a new one. Click **Cancel selection**  to cancel making a selection.*

Choose Multiple Selections with a list

To choose multiple selections at once by entering a list of values:

1. Click the field.
2. Do *one* of the following:
 - Type each value in the **Search** field separated by a space.
 - Copy and paste a list of values (separated by space) into the **Search** field.
3. Select the values in the list.
4. Click the **Confirm selection** check mark.



Select Excluded

Select excluded enables you to easily exclude one or more values that you do not want to include from a list of values, e.g., exclude one major from a list of majors.

1. Click the field and search for a list of values as needed.
2. Select the value(s) you *don't* want to include from the list.
3. Click the **More**  button.
4. Choose **Select excluded** from the drop-down menu.

Change or Clear Current Selections



1. From the **Selections toolbar** at the top of the dashboard, click the desired selection.
2. Make changes to the currently selected values (e.g., add or delete values, etc.) for the field.
3. Click **Clear selection**  to remove the selection.
4. Click the **Clear all selections**  button to remove **all** the current selections.

Lock /Unlock Current Selections

1. From the **Selections toolbar** at the top of the dashboard, click the selection you want to lock.

2. Click the Lock  button.



*Locking a selection prevents it from being cleared if you click the **Clear all selections** button, and prevents you from selecting values not associated with the locked selection.*

3. To unlock, click the locked selection (it will appear "grayed out").
4. Click  at the top of the field box.

View Visualization in Full Screen

1. Hover your mouse over the visualization. One or more pop-up icons displays at the top right of the visualization.
2. Click the **Full screen**  icon, or the **More**  icon (3 dots) then **Full screen**. (or: right-click the visualization)
3. Click the **Exit full screen**  icon at the top right.

Use Smart search

1. Click the **Smart search**  button on the left-side of the **Selections toolbar**.

The Smart search text field opens beneath the button.

2. Type search text in the field.
3. Click the **x** to clear the search and start over.
4. Choose a selection from the search results or click the **Smart search** button again to close the text field.

Export Data

Data from a visualization can be exported as an image, or to a PDF or Excel file. For image and PDF files, only the data on the page exports, so these options are best for charts where all the data displays on the page (and not tables where you must scroll to see additional data).

1. Right-click on the visualization.
2. Select **Download as...** from the drop-down menu.
3. Do any of the following:

To...	Do this...
Export to Excel	<ul style="list-style-type: none"> • Select Data. • Click the download link. • Open and save the file.
Export to PDF	<ul style="list-style-type: none"> • Select PDF. • Choose the PDF settings (or keep the default settings). • Click Export. • Click the download link. • Open and save the file.
Export as image	<ul style="list-style-type: none"> • Select Image. • Select the image settings (or keep the default settings). • Click Export. • Click the download link. • Open and save the file.



*To download a whole sheet as a PDF file, click the **Navigation**  button and select **Download sheet as PDF**.*

Sort a column in a Table

1. Click the Column header to sort in ascending order.
2. Click the Column header again to sort in descending order.

Expand or Collapse a Field in a Table

1. Click the plus  icon for a single value to expand it to the right.
2. Click the minus  icon for a single value to collapse it to the left.
3. Right-click any column and select **Expand / collapse**, then **Expand all** to expand all columns to the right.
4. Right-click any column and select **Expand / collapse**, then **Collapse all** to collapse all columns to the left. (except calculations)

Create a Bookmark

1. Choose the selections you want to save as a bookmark.
2. Click the **Bookmarks**  button at the top of the dashboard.
3. Click **Create new bookmark**.
4. Type a name for your bookmark in the **Title** field.
5. Optionally, add a description in the **Description** field.
6. Click **Save layout** only if you've made any format changes to the sheet (e.g., moved columns around) that you want to save.
7. Click **Create**.
8. The bookmark is automatically saved to your Bookmarks list. Click outside the Bookmarks window to close it.

Select a Bookmark

1. Click the **Bookmarks**  button at the top of the dashboard.
2. Do one of the following:

To apply...	Do this...
the bookmark to the current sheet	<ul style="list-style-type: none"> • Right-click the bookmark. • Select Apply selections only.
the bookmark and jump to the sheet it was created in	Select the bookmark.

Delete a Bookmark

1. Click the **Bookmarks**  button at the top of the dashboard.
2. Right-click on the bookmark you want to delete.
3. Select **Delete**.

Get Help

- Go to the [Data & Analytics Community in Microsoft Teams](#) (must join the team for access).
OR
- Click the **Navigation**  button, and then select **Help** (this takes you to Qlik's Help).



UBI Analytics (Qlik Sense®) Navigation Quick Reference

Log On & Access an App

Go to ubihub.admin.virginia.edu/ to access the **UBI Portal**. Enter your NetBadge credentials and select the desired app.

OR

1. Go to <https://qsenseprod.admin.virginia.edu/hub>.
2. Log on with your NetBadge credentials.
3. Select the desired stream under **Streams** on the left side of the screen.
4. Click the thumbnail (top) for the desired application.

Select a Sheet

- From the **App overview**, select the sheet you want.
OR
- From a Sheet, select the **Sheets**  drop-down at the top right, and select the sheet you want.

Go to the App Overview

Select the **Navigation**  button at the top left of the page, then select **App overview**.

View Info about the App

From the **Sheets** drop-down or **App overview**, select the **About Page** sheet (top part of the thumbnail).