Collaborate in Qlik Sense

Qlik Sense®
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1   About this document

This guide will introduce you to working with data storytelling, publishing, and exporting and printing, to make content available to other users.

Qlik Sense is developed with collaboration in mind and provides tools to help create a common understanding to support decisions and influence others.

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.

You find the online help, additional guides and much more at help.qlik.com/sense.

2   Data storytelling

Data storytelling gives you a way of sharing your data discovery insights with other people, whether your insights are part of a larger discussion or the main topic.

The purpose of data storytelling is to connect the data discoveries in a story and emphasize elements that are important in your discussions and decision-making. Adding emphasis will help you to create convincing stories to support you and your stakeholders in decision-making.

Data storytelling lets you combine reporting, presentation, and exploratory analysis techniques to create and share for collaboration. You take snapshots of your discovered data (like reports) for use in stories, structured by one or more slides. The snapshots can be enhanced with various effects to let you emphasize the data insights you want your audience to focus on.

As you tell the story to other people, and when new questions arise, you can switch directly to the source of the snapshot and get access to the live data. This opens up the possibility for you to take the story in new directions, triggering new conversations and more insights.

Another way to make storytelling even more interactive and engaging is by inserting live data sheets in slides and making selections in them while presenting the story for your audience.

2.1   The story

In data storytelling, you use a story to collect and present insights and ideas to your audience. A story is presented as a timeline with one or more slides, and can be based on traditional data storytelling structures (such as a three-act play, hero's journey, and so on).

Stories are contained within an app. A story is connected to its app, so you can return to the live data anytime, to discover new and hidden stories.

To build a story you use time-based snapshots of your data visualizations and live data sheets and place them on the story's timeline.

You can, for instance add text and shapes, put emphasis on certain insights with visual effects, apply styling, and so on, to make the story compelling and engaging, and its purpose very clear.

You can export the story if you want to present it outside of Qlik Sense.

2.2   Snapshots

A snapshot is a graphical representation of the state (type and data) of a data object at a certain point in time that you can use when you build stories. The snapshot you take is a copy of the state. This means that the state of the snapshot does not change when the state of the corresponding data object gets updated.

Snapshots capture individual objects on a sheet during the analysis process. They store the visualization and data as you see it at that time enabling you to use them at a later point in time to tell a story. Each snapshot contains a bookmark back to the original context so that you quickly get access to the live data.

When you take a snapshot you can make an annotation for your snapshot. The annotation helps you distinguish between the different snapshots in the snapshot library when you build your story. The annotation is not visible when you play the story.

> *A snapshot's state and selections will not be updated at a data reload. It will always reflect the data that existed at the point in time the snapshot was taken.*

2.3   Live data sheets

If you use live data sheets in a story you can make selections in the sheets, while playing the story. This means that you can show your insights for your audience by making selections, without going to the app itself.

When you play a story you can make and reset selections in the live data sheets just as you can in a sheet, in sheet view.

> *The reset gives you the possibility to always return to the same selections as when you inserted the live data sheet on the slide.*

2.4   Collecting insights for a story using snapshots

For you to be able to get the full picture of your app, you need a way to collect the insights you encounter. For this you use and take static snapshots of your visualizations.

A snapshot is a graphical representation of the state (type and data) of a data object at a certain point in time that you can use when you build stories. The snapshot you take is a copy of the state. This means that the state of the snapshot does not change when the state of the corresponding data object gets updated.

When you take a snapshot you can make an annotation for your snapshot. The annotation helps you distinguish between the different snapshots in the snapshot library when you build your story. The annotation is not visible when you play the story.

When you have taken snapshots of a specific visualization you can open the **Snapshot library** from the visualization's shortcut menu. From there you can decide which snapshots you would like to keep and use in your coming stories. You can edit the annotation and delete the snapshots taken of the visualization.

> *When the snapshot library is opened from storytelling view, all the snapshots from all the visualizations in the app are displayed.*

If the visualization you are trying to take a snapshot of is an extension, the snapshot functionality in the visualization extension's main script must be enabled by setting the snapshot property to true.

Taking a snapshot

When you are in sheet view, you can take snapshots of the visualizations and use them to build a story in data storytelling.

You can take snapshots of all the different visualization types but not the filter panes.

Do the following:

1. In sheet view, hover over the visualization you want to take a snapshot of.
2. Click 📷 at the top right of the visualization or long-touch/right-click the visualization and select 📷 .
    The annotation dialog opens.
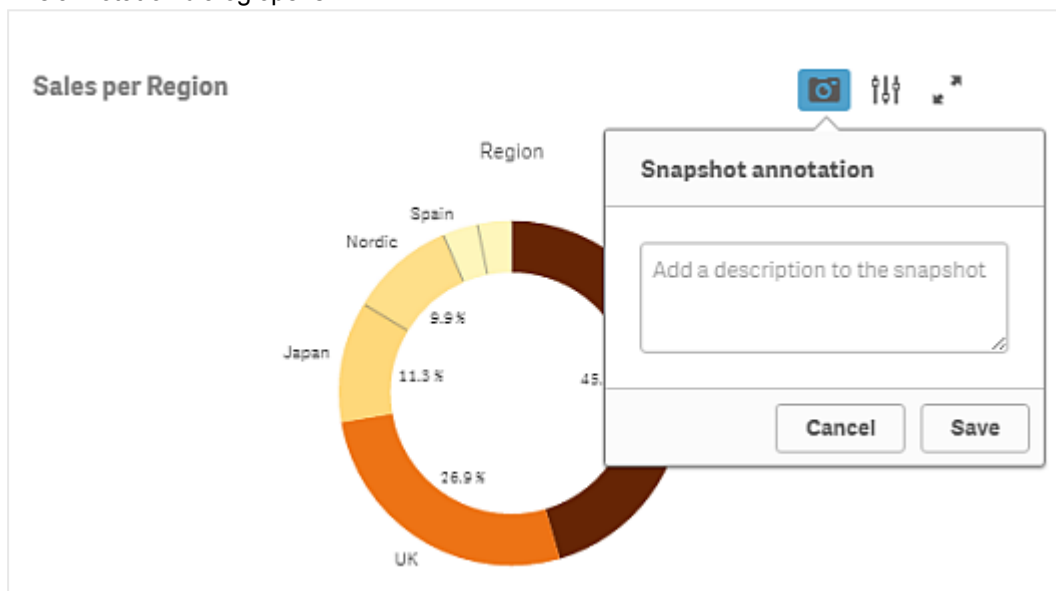
The annotation dialog when taking a snapshot of the visualization "Sales per Region ".

3. Type a description to help distinguishing between the snapshots in the snapshot library.
4. Click **Save** or click outside the dialog to close the dialog.
    The annotation is saved.

The snapshot is saved and named with the title of the visualization.

Viewing snapshots

Do the following:

1. Long-touch/right-click the visualization you want to view snapshots for.
    The visualization's shortcut menu is opened.
2. Select **Open snapshot library**.

The **Snapshot library** is opened with a list of all the snapshots taken of the visualization. The date stamp and any annotations helps you to distinguish between your snapshots.

3. Click outside the library to close it.

Deleting snapshots

Do the following:

1. Long-touch/right-click the visualization you want to view snapshots for.
    The visualization's shortcut menu is opened.

2. Select **Open snapshot library**.

    The **Snapshot library** is opened with a list of all the snapshots taken of the visualization. The date stamp and any annotations helps you to distinguish between your snapshots.

3. Click ✎ **Edit**.

4. Select the snapshots you want to delete.

    > *You cannot delete snapshots that belong to a published version of an app.*

5. Click 🗑 .

    The selected snapshots are deleted.

6. Click ✎ or outside the text.

7. Click outside the library to close it.

2.5   Selecting insights for a story with the snapshot library

You add your insights to a story by using the snapshots you have taken. You can access all the available snapshots from the snapshot library in storytelling view.

Viewing snapshots from the snapshot library

When you are working on a story you can view all your snapshots from the snapshot library.

Do the following:

1. In storytelling view, click 📷 in the story tools panel.

    The snapshot library is opened with your snapshots sorted by date with the most recent snapshot on top.

2. Click 📷 to close the snapshot library.

Editing annotations in the snapshots library

When taking a snapshot you can choose to add an annotation. From the snapshot library, you can change the annotations or add annotations to snapshots without annotations.

Do the following:

1. In storytelling view, click ⬛ in the story tools panel.

   The snapshot library is opened with a list of all your snapshots.

   > 💡 *You can also access a snapshots library for each visualization. In sheet view, long-touch/right-click the visualization you want to view snapshots for and select **Open snapshot library** in the shortcut menu.*

2. Click ✎ .

3. Click the annotation text area, to the right of the snapshot name.
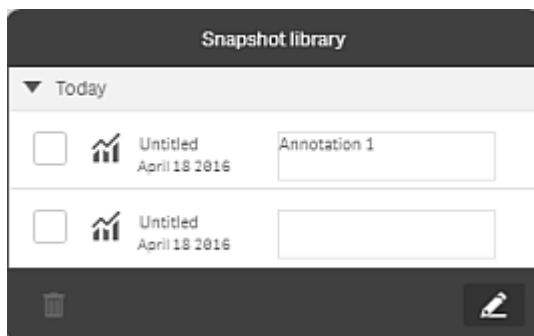
   > ℹ️ *You cannot edit annotations for snapshots that belong to a published version of an app.*

4. Edit the annotation.

5. Click ✎ or outside the text area.
   The annotation is saved.

6. Click outside the library to close it.

Deleting snapshots from the snapshots library

You can delete a snapshot from the snapshot library, which contains all snapshots you have taken in the app. You cannot delete snapshots that belong to a published version of an app.

Do the following:

1. In storytelling view, click ⬛ in the story tools panel.

   The snapshot library is opened with a list of all your snapshots.

   > 💡 *You can also access a snapshots library for each visualization. In sheet view, long-touch/right-click the visualization you want to view snapshots for and select **Open snapshot library** in the shortcut menu.*

2. Click ✎ .

Editing is enabled.

3. Select the snapshots you want to delete.

> *You cannot delete snapshots that belong to a published version of an app.*

4. Click 🗑 .

The selected snapshots are deleted.

5. Click ✎ to stop editing.

6. Click outside the library.
The library is closed.

You have now deleted snapshots from the library.

2.6   Building a story

The purpose of a story is to gather insight throughout your analysis and build clear narratives around your data. You structure the story in a way that makes it come out as convincingly as possible for your audience.

You use slides to structure your story and put snapshots of your data visualizations into these slides. To make things stand out on the snapshots you apply visual effects, and add text and shapes. You can also embed sheets into slides to make your story even more interactive.

A story is connected to its app, so you can return to the live data anytime, to discover new and hidden stories.

Working with stories

In this section you will find how to work with stories, for instance by creating, duplicating and changing settings for a story.

Creating a new story

Do the following:

1. From the app overview or sheet view, click 🖥 to view the stories.

2. Click ➕ or **Create new story**.
A new story is created named **My new story**.

3. Give your story a meaningful title and add a description, if you require.

4. Click outside the text area to save the title and description.

The new story is saved.

Editing a story

When new data has been loaded into an app you analyze the data in your app to get new insights based on the new data. You can present your new insights either in a new story or in a edited version of an existing story.

A snapshot's state and selections will not be updated at a data reload. It will always reflect the data that existed at the point in time the snapshot was taken.However, embedded sheets are not static and will be affected by a data reload.

You can easily replace a snapshot of a visualization on a slide by going to the source of the visualization in the app. You will now see the visualization with updated data and can take a new snapshot if you want to use an updated version in your story.

When you take a snapshot you can make an annotation for your snapshot. The annotation helps you distinguish between the different snapshots in the snapshot library when you build your story. The annotation is not visible when you play the story.

> *If you want to keep the original story you can make a duplicate of the story before you start editing the story.*

> *You can export the story if you want to present it outside of Qlik Sense.*

Duplicating a story

You can duplicate any story, regardless of whether it is a story that belongs to the app or a story you have created yourself. The purpose of duplicating stories is to save time by reusing content, and to allow you to modify the duplicate so that it fits your needs better.

A duplicated story contains the same content as the original story, and is linked to the same snapshots. The duplicated story will not be updated if the original story is updated. Duplicated stories appear under **My stories** in app overview and in the story navigator.

Duplicating a story from app overview

Do the following:

1. Click on the left-hand side to show the stories of the app.
2. Long-touch/right-click a story.
   The shortcut menu opens.
3. Click **Duplicate**.

The new story is created, and you find it under **My stories**.

> *You can also duplicate a story when you are in storytelling view, using the story navigator .*

Changing the title and description of a story

You can change the title and description of your stories.

Do the following:

1. In the app overview, click ⬛ to view the stories.
2. Do one of the following:
   - If you are in grid view, ⬛ , click the story title followed by clicking ✏ .
   - If you are in list view, ☰ , click ✏ .
3. Edit **Title** and **Description**.
4. Click outside the text area.

The changes you made are saved.

> 💡 *You can also change a story's title and description in the story navigator at the top right.*

Changing the thumbnail of a story

You can replace the default thumbnail of a story with another thumbnail, to make it easier to distinguish between stories in the app overview and in the story navigator. You can use one of the default images, or an image of your own.

Do the following:

1. In the app overview, click ⬛ to view the stories.
2. Do one of the following:
   - If you are in grid view, ⬛ , click the story title followed by clicking ✏ .
   - If you are in list view, ☰ , click ✏ .
3. Click 🖼 on the default thumbnail.
   The **Media library** opens.
4. Click on a folder in the media library, for example **In app** or **Default**.
5. Select the image you want to use as a thumbnail for the story and click **Insert**.
6. Click ✔ to stop editing.

The image you selected is now used as a thumbnail for the story, and is visible in the story navigator and in the app overview.

> 💡 *You can also change a story's thumbnail in the story navigator at the top right.*

> 💡 *The optimal aspect ratio of a thumbnail is 8:5 (width:height).*

> *The following formats are supported: .png, .jpg, .jpeg, and .gif.*
>
> *For Qlik Sense: You can upload images to the **In app** folder in the media library. You need to use the Qlik Management Console to upload images to the default folder.*
>
> *For Qlik Sense Desktop: If the default folder is empty, or you want to add your own images, you find the folder at: <user>\Documents\Qlik\Sense\Content\Default. When moving an app between installations, images are bundled and saved in the qvf file together with the rest of the contents of the app. You find the bundled images in the **In app** folder in the media library.*

> *You can only add or change the thumbnail of an unpublished story.*

Deleting a story

Do the following:

1. From the app overview, click ⬚ to view the stories.
2. Long-touch/right-click the story you want to delete.

   The shortcut menu opens.
3. Click **Delete**.
4. To confirm that you want to delete the story, click **Delete**.

The story is deleted from the app.

> *You can also delete a story in the story navigator ⬚ .*

Working with slides

The purpose of slides in a story is to create a structure to your story.

In this section you will find how to work with slides, for instance by adding, reordering and deleting slides. You will find how to add a snapshot to a slide and how to reorder, resize and copy items on slides.

Adding a slide to a story

You can extend your story by adding one or more slides to it.

Do the following:

1. From the app overview or sheet view, click ⬚ to view the stories.
2. Click on the story you want to add the slide to.
   The story opens in storytelling view with slide thumbnails visible in the story timeline.
3. Click ➕ in the story timeline.

A new slide is added. You can now add contents to the slide, such as snapshots.

Adding a snapshot to a slide

You can add snapshots to a slide from your **Snapshot library**.

Do the following:

1. In storytelling view, click ⬛ in the story tools panel.
    The **Snapshot library** is opened. The date stamp and any annotations helps you to distinguish between your snapshots.
2. Locate the snapshot you want to add and drag it onto the slide.
    The snapshot snaps to the grid. You can use the keyboard arrows to move it freely.

The snapshot is placed on the slide.

Adding a live data sheet to a slide

You can add live data sheets to a story slide. When you insert a live data sheet to a story, the current selections of the app are saved with the selected sheet. Every time a live data sheet is viewed in a story, these selections will be applied.

Do the following:

1. In storytelling view, click ⬛ in the story tools panel.
    A dialog opens.
2. Click the sheet you want to use in the story.

The live data sheet is added to a new slide.

Replacing a live data sheet on a slide

You can replace a live data sheet on a story slide.

Do the following:

1. In storytelling view, select a slide with a live data sheet in the story timeline.
    A dialog opens.
2. Click the active sheet.
    A new dialog opens.
3. Select a new sheet to insert.

The selected sheet is added as a live data sheet on the slide.

Replacing a snapshot on a slide

You can replace a snapshot of a visualization on a slide. This is useful when you want to use another snapshot of the visualization, for example when new data is loaded into the app, if the visualization is changed or if new selections are made.

Do the following:

1. In storytelling view, select a snapshot on a slide and click 📷 .
   The **Replace snapshot** dialog is opened and displays all snapshots of the originating visualization.
   The snapshot in use is marked with ✔ . The date stamp and any annotations helps you to distinguish between your snapshots.
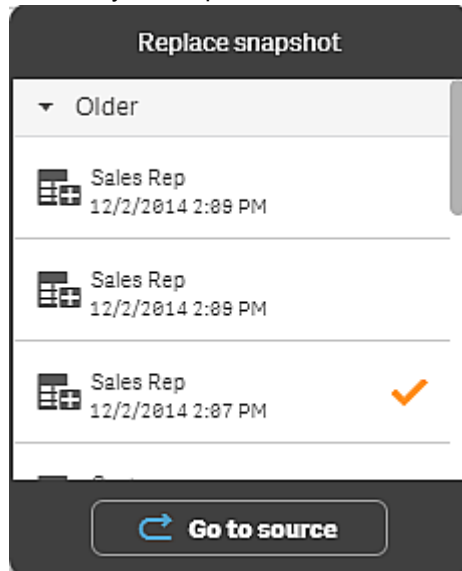
> 💡 *You can navigate to the sheet and visualization which the snapshot originated from, by clicking ↪ **Go to source**. By doing this you get access to the live data of the snapshot, where you can make new selections and take new snapshots.*

2. Select the snapshot you want to use.
   The snapshot is updated and adapts to the size of the previous snapshot, using free resize which causes the visualization to use progressive disclosure.

> ℹ️ *Progressive disclosure means the following: If the size of a visualization (or a unlocked snapshot) is increased, its information is disclosed progressively. If the size of a visualization (or a unlocked snapshot) is decreased, its information is reduced, which allows you to focus on the essential information and avoid cluttering the visualization with too much information in too little space.*

The snapshot is replaced on the slide.

Copying and moving items on story slides

You can copy and move items on the same story slide or between story slides. You can do this in different ways:

- Using the edit bar on the sheet (📋 , ✂ and 📑).
- With the keyboard shortcuts Ctrl+C, Ctrl+X and Ctrl+V.

> You can copy items between stories in the same app, but not between stories in different apps. Switch between stories using [icon] in the toolbar.

Copying items

Do the following:

1. In storytelling view, click on the item you want to copy.
   The item is highlighted.
2. Click [icon] .
3. To insert the item on another slide, switch to that slide.
4. Click [icon] .

The copied item is placed in front of any other items.

Moving an item to another slide

To move an item between two story slides you first cut it out from one slide and then paste it onto another slide.

Do the following:

1. In storytelling view, click on the item you want to move.
   The item is highlighted.
2. On the edit bar, click [icon] .
3. Switch to the slide you want to move the item to.
4. Click [icon] .

The moved item is placed in front of any other items on the slide.

Duplicating a slide in a story

You can duplicate a slide in a story.

Do the following:

1. Click the story you want edit.
   The story opens with slide thumbnails to the left.
2. Long-touch/right-click the slide that you want to duplicate.
3. Select **Duplicate**.

The duplicate slide is placed below the original slide.

Reordering items on a slide

When you are editing a story slide you can arrange and stack items on top of each other and decide the order in which the stacked items appear. This is useful when items overlap.

Reordering by one level

Do the following:

1. Long-touch/right-click the item you want to reorder.
    The item's shortcut menu is opened.
2. Select **Bring forward** or **Send backward**.

The selected item is brought one level forward or sent one level backward.

Reordering to the front or the back

Do the following:

1. Long-touch/right-click the item you want to reorder.
    The item's shortcut menu is opened.
2. Select **Bring to front** or **Send to back**.

The selected item is sent behind or brought in front of all the other items on the slide.

Reordering slides on the timeline

When you are editing a story you can move slides around on the timeline.

Do the following:

1. On the timeline long-touch/click and hold the slide you want to move.
2. Drag it to a new location.

A gap will open up between the slides at the new location and the slide will be placed there.

Resizing items on a slide

You can resize an item on a slide by using its resizing handles. When you resize items such as images and text titles, they keep their aspect ratio. Paragraph texts and certain shapes can be resized more freely, both horizontally and vertically.

Snapshots can be resized in two different ways:

- Locked: keeping the aspect ratio.
- Unlocked: allowing free resizing and progressive disclosure.

> *Progressive disclosure means the following: If the size of a visualization (or a unlocked snapshot) is increased, its information is disclosed progressively. If the size of a visualization (or a unlocked snapshot) is decreased, its information is reduced, which allows you to focus on the essential information and avoid cluttering the visualization with too much information in too little space.*

Resizing in general

Do the following:

1. In storytelling view, click on the item you want to resize.
2. Drag one of the resizing handles to resize the item.
   The item snaps to the grid.
3. Release the resizing handle.

The item is resized.

Deleting items from a slide

Do the following:

1. In storytelling view, click on the item you want to delete.
   The item is highlighted.
2. On the edit bar, click 🗑 .

The item is deleted from the slide.

> *You can also delete an item by selecting **Delete** from the item's shortcut menu.*

Deleting a slide from a story

Do the following:

1. In storytelling view, on the timeline, long-touch/right-click the slide you want to delete.
   The slide's shortcut menu is opened.
2. Click **Delete slide**.

The slide is deleted from the story and the timeline.

2.7   Making a story compelling

To make the story convincing and compelling, you can add emphasis to your insights. You do this by adding text, images and shapes to your story slides as well as applying effects to your snapshots to get some data to stand out.

Adding emphasis

You can add emphasis to your insights to make them clear and engaging for your audience. You do this by adding effects to your snapshots to highlight certain data points, and at the same time suppressing information that might be irrelevant. In this way, the effects help you reduce information overload for your audience so that they can focus on the key insights you want to present to them.

In this section you find topics that will help you emphasize your insights, for instance how to apply various effects to a snapshot and how to highlight data points in a snapshot.

Another way to emphasize an insight and to reduce information overflow is to hide information. For example you could change a snapshot's appearance so that elements such as titles, axes, data point lines, footnotes, legends, and so on, are hidden.

Applying an effect to a snapshot

You can add different visual effects to your snapshots to make certain values stand out.

> *You can only use effects on bar charts, line charts, and pie charts.*

Do the following:

1. In storytelling view, click ✦ in the story tools panel.
   The effects library is opened.
2. Locate the effect you want to use and drag it onto the snapshot.

The snapshot is shown with the visual effect.
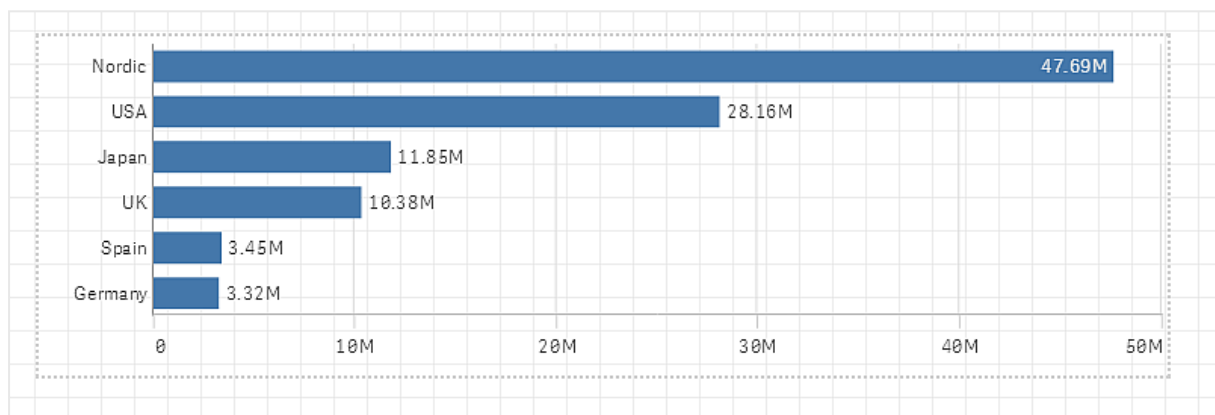
Snapshot without an effect
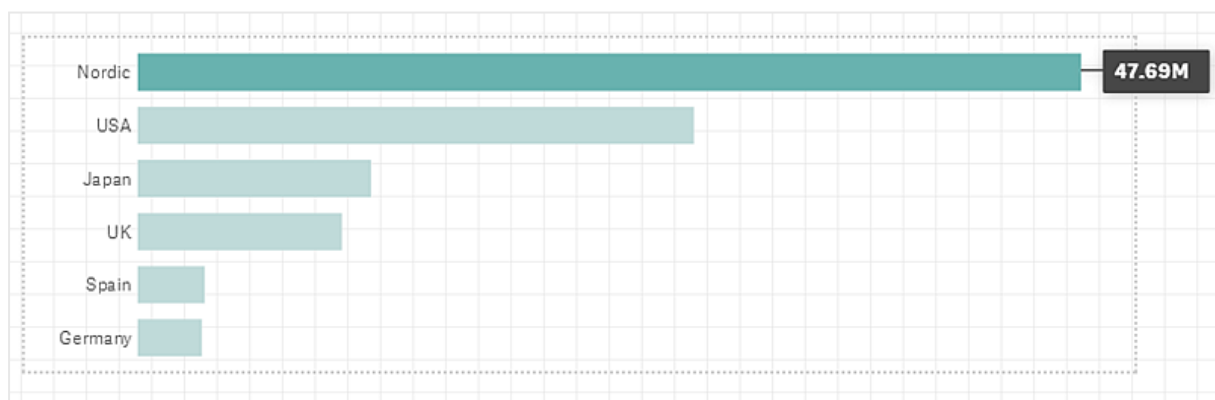
*Snapshot with the effect **Highest value** applied to it*

Highlighting data points in a snapshot

For a snapshot with the effect **Any value** applied to it, it is possible to select a certain data point to highlight.

Do the following:

1. In storytelling view, on a slide, select a snapshot with the applied effect **Any value**.

2. Click ✏ in the snapshot.
   A dialog with a list of data points appears.

3. Click one of the data points in the list.

> *You can also click directly on the data points in the snapshot.*

4. Click outside the snapshot.

The selected data point is now highlighted in the snapshot.

Removing an effect from a snapshot

Do the following:

1. In storytelling view, right-click on the snapshot with the effect you want to remove.
   A shortcut menu appears.

2. In the shortcut menu, click **Remove effect**.

The effect is removed from the snapshot.

Styling with text and shapes

To make your story compelling you can add stylistic elements such as text, hyper links and shapes. You can format these elements with size, color, font style, and so on.

In this section you find topics that will help you style your insights, for instance by adding and formatting text and shapes.

Adding text to a slide

You can add different styles of text to a story slide.

Do the following:

1. In storytelling view, click **A** in the story tools panel.
   The **Text objects** dialog is opened.

2. Locate the text style you want to add and drag it onto the slide.
   The text object is placed on the slide and snaps to the grid. You can use the keyboard arrows to move it freely.

3. Double-click on the text object or click ✏ .

4. Type your text.

5. Click outside the text object or click ✏ .

The text is saved.

Formatting text on a slide

On a story slide you can change the format of your texts with the text formatting toolbar. You can change color, size, font style, and text alignment. Additionally, you have options for adding links and bookmarks.

Text formatting toolbar for paragraph text object

> *To enable a text object for formatting, you double-click on it.*

Changing the font style

Do the following:

1. In storytelling view, double-click on the text object you want to format. Or, click on the text object and click ✎ .
    The text formatting toolbar appears.
2. Select the text you want to style.
3. Click one or more of **B** , *I* and <u>U</u> .
4. Click outside the text object or click ✎ .

The font style of the text is changed.

Changing the font size of a paragraph

Do the following:

1. In storytelling view, double-click the **Paragraph** text object you want to format. Or, click on the text object and click ✎ .
    The text formatting toolbar appears.
2. Select the text you want to resize.
3. Click ▼ next to the font size indicator and select a size: XS, S, M, L or XL.
4. Click outside the text object or click ✎ .

The font size of the text is changed.

Changing the font size of a title

Do the following:

1. In storytelling view, click the **Title** text object you want to format.
2. Drag one of the corners to change the font size.
3. Click outside the text object or click ✎ .

The font size of the text is changed.

Changing the text alignment of a paragraph

Do the following:

1. In storytelling view, double-click the **Paragraph** text object you want to format. Or, click on the text object and click ✎ .
   The text formatting toolbar appears.
2. Click in the text paragraph you want to align.
3. Click ☰ , ☰ or ☰ .
4. Click outside the text object or click ✎ .

The text alignment is changed.

> ⓘ   *By default, the text is left-aligned.*

Changing the text color

Do the following:

1. In storytelling view, double-click the text object you want to format. Or, click on the text object and click ✎ .
   The text formatting toolbar appears.
2. Select the text you want to change color on.
3. Click ▼ next to the color indicator in the toolbar.
   A color palette appears.
4. Click on a color in the palette.
5. Click outside the text object or click ✎ .

The color is applied to the text.

Adding a shape to a slide

You can add different types of shapes on a slide.

Do the following:

1. In storytelling view, click ◼● in the story tools panel.
   The shapes library is opened.
2. Locate the shape you want to use and drag it onto the slide.
   The shape is placed on the slide and snaps to the grid. You can use the keyboard arrows to move it freely.

The shape is placed on the slide.

Formatting shapes on a slide

Using the shapes formatting toolbar you have the following options to format your shapes:

- Color

Changing the color of a shape

Do the following:

1. In storytelling view, click the shape you want to format.
   A toolbar with color options appears.
2. Click the color square in the toolbar.
   A color palette appears.
3. Click a color.
4. Click outside the shape.

The color is applied to the shape.

Adding a bookmark on a slide

Via the text formatting toolbar, there is a link option where you can add bookmarks inside a text object.

Adding a bookmark

You can mark a text paragraph and use it for a bookmark.

Do the following:

1. In storytelling view, double-click the text object you want to add the bookmark in.
   The text formatting toolbar appears.
2. Select the text paragraph that you want to use for the bookmark.
3. Click 🔗 .
   A dialog opens.
4. Click **Bookmarks** on the right and select a bookmark from the list.
5. Click outside the text.

The bookmark is added.

Adding an image to a slide

You can add an image to a story slide. You can use one of the default images, or an image of your own.

Do the following:

1. In storytelling view, click 🖼 in the story tools panel.
   The **Media library** opens.

2.
   > *The following formats are supported: .png, .jpg, .jpeg, and .gif.*
   > *For Qlik Sense: You can upload images to the **In app** folder in the media library. You*
   > *need to use the Qlik Management Console to upload images to the default folder.*

> ℹ *For Qlik Sense Desktop: If the default folder is empty, or you want to add your own images, you find the folder at: <user>\Documents\Qlik\Sense\Content\Default. When moving an app between installations, images are bundled and saved in the qvf file together with the rest of the contents of the app. You find the bundled images in the **In app** folder in the media library.*

3. Click on a folder in the media library, for example **In app** or **Default**.
4. Select the image that you want to add to the slide.
   A preview of the image is shown.
5. Click **Insert**.

> ℹ *Alternatively, long-touch/right-click the image file you want to add and select **Insert**.*

The image is added and snaps to the grid. You can use the keyboard arrows to move it freely.

> ℹ *If the image is larger than the width or height of a slide, it will be re-sized to fit on the slide.*

Adding a link on a slide

Via the text formatting toolbar, there is an option for adding a link inside a text object.

Adding a link

You can mark a text paragraph and use it for a link.

Do the following:

1. In storytelling view, double-click the text object you want to add the link in.
   The text formatting toolbar appears.
2. Select the text paragraph that you want to use for the link.
3. Click 🔗 .
   A link dialog opens.
4. In the **Link to** field, type the web address that you want to link to.

> ℹ *If you do not add a prefix, http:// is added automatically, assuming that you are adding a web address.*

5. Click 🔗 or press Enter, to apply the new link.
6. Click outside the text.

The link is added.

Removing a link

You can remove a link from a text paragraph.

Do the following:

1. In storytelling view, double-click the text object you want to remove the link from.
   The text formatting toolbar appears.
2. Click the link so that the cursor is somewhere inside it.
3. Click 🔗 .
   A link dialog opens.
4. Click 🗑 .
5. Click outside the text.

The link is removed, but the text paragraph is kept.

Changing a snapshot's appearance

One way to make insights stand out and help you getting your message through in a clear way is the possibility to hide, or show, certain parts of a snapshot.

Changing snapshot properties

The following list summarizes the editable properties.

- Titles (main title, subtitle and footnote)
- Grid line spacing
- Labels (data point labels, leaf labels, dimension labels)
- Legend
- X-axis with title and labels
- Y-axis with title and labels

Do the following:

1. In storytelling view,click the snapshot you want to edit.
2. Click ✏ .
   A dialog where you can change the snapshot's appearance is opened.
3. For **Show titles** click either **On** or **Off** to show or hide main title, subtitle and footnote.
4. For **Grid line spacing** you can set the spacing of the grid lines to **Auto** or **Custom** and select one of the options **No lines**, **Wide**, **Medium** or **Narrow** from the drop-down list.
5. For **Value labels** click either **Auto** or **Off**.
6. For **Show legend** click either **Auto** or **Off**.
7. For **x-axis** and **y-axis Labels and title**, select one of the options **Labels and title**, **Labels only**, **Title only** or **None** from the drop-down list.
8. Click **Done**.

The snapshot's appearance has changed.

If you select auto and the property is not shown, you need to increase the size of the snapshot.

A snapshot dialog with grid lines and only the x-axis and the data labels visible.

Changing the aspect ratio when resizing a snapshot

When you resize a snapshot you can choose to unlock the aspect ratio to enable free resize. Then the resize causes the visualization to use progressive disclosure.

Progressive disclosure means the following: If the size of a visualization (or a unlocked snapshot) is increased, its information is disclosed progressively. If the size of a visualization (or a unlocked snapshot) is decreased, its information is reduced, which allows you to focus on the essential information and avoid cluttering the visualization with too much information in too little space.

Do the following:

1. In storytelling view, click the snapshot you want to resize.
2. Click 🔒 to unlock the aspect ratio for free resize.
   🔓 is displayed.
3. Use the handles on the edges to resize the visualization.

The resize causes the visualization to use progressive disclosure.

4.   Click 🔓 to lock the aspect ratio.

You now have changed the aspect ratio in the snapshot and resized the visualization.

> *If f you resize the visualization when 🔒 is displayed, the image is resized without progressive disclosure.*

2.8   Presenting a story

While building your story you can play it to see how it would look and behave for an audience. When playing the story it occupies the whole browser view. You can see what your snapshots, embedded sheets, texts, shapes and visual effects look like.

When your audience asks questions, you can access the live data of your snapshots and your embedded sheets. This opens up a possibility for you to find new hidden stories to present and steer the story in new directions.

Playing a story

You can play a story as it would be presented to an audience. There are controls for you to navigate back and forth through the slides. On a slide with a live data sheet inserted, you must first click the sheet before you can start making selections in it.

Entering play

Do the following:

- In storytelling view, click ▶ above the timeline.

The story is opened in the full browser view and is ready to play on the current slide.

> *You can also start playing a story by long-touching/right-clicking it in the app overview or the story navigator, and selecting **Play** from the shortcut menu.*

> *On a touch device you can zoom in and out on the slide by using the pinch touch gesture. When you zoom in, you cannot make selections in live data sheets.*

Showing data point information

Do the following:

- Hover over a data point to display a tool tip with data point information.

Showing slide number

Do the following:

- Click ••• at the bottom of the slide to show which slide you are currently viewing and the total number of slides in the story: <current slide number> **of** <total number of slides>.

Navigating between slides

Do the following:

1. Click ••• at the bottom of the slide.

2. Click ❮ and ❯ to navigate between the slides.

> *On a touch device you swipe the slide left or right. On a computer you can use the keyboard arrow keys or the space key.*

Interacting with a live data sheet

To interact and make selections in a live data sheet you need to click somewhere on the sheet first.

Do the following:

- Click on the live data sheet.

The sheet is now possible to make selections.

> *You disable the possibility to make selections by clicking outside the live data sheet, or by navigating to another slide.*

Exporting a story

Do the following:

1. Click ••• at the bottom of the slide.

2. Click 📑 .
   The **PowerPoint settings** dialog opens.

See: *Exporting a story (page 49)*

Closing play

Do the following:

- To close play either click ⊗ or press Esc.

Accessing the live data of a snapshot

From a snapshot (on a story slide) you can navigate to the sheet and visualization it originated from. By doing this you get access to the live data of the snapshot where you can make new selections to take your story in new directions.

Do the following:

1. In storytelling view, navigate to a story slide with a snapshot.
2. Long-touch/right-click the snapshot.
   The snapshot's shortcut menu is opened.
3. Select **Go to source**.

You are directed to the sheet where the snapshot originated from. And the visualization which the snapshot was taken of, is initially highlighted.

To go back to the story, click ⮌ **Return**.

> *A snapshot shows data according to the access rights of the user who takes the snapshot, and the snapshot can then be shared in a story. However, when users return to a visualization from a story to see the live data in the app, they are restricted by their own access rights.*

> *If the visualization that the snapshot came from is no longer available, you are still directed to the originating sheet. If the whole sheet where the visualization was placed on is no longer available, you stay in storytelling view and get an error message stating **Sheet is missing**.*

> *You can also access a snapshot's live data while playing the story.*

Accessing a sheet from a slide

When you play a story, you can navigate from a live data sheet to the sheet in sheet view. By doing this you get access to the original sheet with your selections applied to it. You can then make new selections to take your story in new directions.

Do the following:

1. While playing the story, navigate to a story slide with a live data sheet.
2. Click **Go to sheet**.

You are directed to the sheet in sheet view carrying with you the selections you have made on the live data sheet.

To go back to the story, click **Return**.

Selecting in a live data sheet

When you play a story you can make selections in live data sheets just as you can in a sheet in sheet view.

Enable selections

Do the following:

1. In storytelling view, click ▶ above the timeline.
2. Navigate to a slide with a live data sheet.
3. Click on the sheet to enable it for selections.
   The sheet is possible to interact with.
4. Start making selections in the visualizations.

The visualizations respond to selections and filter out subsets of the data.

> *You disable the possibility to make selections by clicking outside the sheet, or by navigating to another story slide.*

When you are playing a story on a small screen you must go to sheet view to view the sheet and make selections.

Reset selections

You can reset the selections you have made on the live data sheet.

Do the following:

- While playing the story and with some selections made on a live data sheet, click **Reset selections**.

The sheet's selections will be reset to the same selections it had at the time you inserted the live data sheet on the slide.

> *The reset gives you the possibility to always return to the same selections as when you inserted the live data sheet on the slide.*

2.9   Troubleshooting - Using data storytelling

This section describes problems that can occur when using data storytelling in Qlik Sense.

I cannot edit a story

I want to make changes to a story but I cannot edit it.

Possible cause

The story is published.

Proposed action

If you created the story, unpublish the story to enable editing.

See: *Unpublishing a story (page 40)*

Proposed action

If you did not create the story, make a duplicate of the story to enable editing. The duplicated story will not be updated if the original story is updated.

See: *Duplicating a story (page 13)*

A sheet is missing

When I play a story a sheet is missing.

Possible cause

The sheet has been deleted.

The sheet is private (located in another user's **My sheets**).

Proposed action

If the sheet is private, ask the owner of the sheet to publish it.

See: *Publishing (page 35)*

See: *Publishing a sheet (page 39)*

I cannot change a snapshot's appearance

I want to use auto for a snapshot property but the snapshot's appearance is not affected.

Possible cause

The snapshot is too small.

Proposed action

In storytelling view, increase the size of the snapshot.

See: *Resizing items on a slide (page 19)*

I cannot add a link inside a text object

I want to add a link inside a text object but the link is not working.

Possible cause

You are using Internet Explorer 10 or 11. Then you cannot copy and paste links from external sources because the formatting is lost when links are pasted into text objects.

Proposed action

Use another web browser and add the link.

See: *Adding a link on a slide (page 26)*

I cannot take a snapshot

I want to take a snapshot but it is not possible.

Possible cause

The visualization you are trying to take a snapshot of is incomplete.

The visualization you are trying to take a snapshot of is an extension that has not enabled snapshot functionality.

The visualization you are trying to take a snapshot of is a filter pane. Snapshots of filter panes are not supported.

Proposed action

Complete the visualization.

Enable snapshot functionality in the main script of the visualization extension by setting the snapshot property to true. You need permission to edit the script or need to get help from a developer.

I cannot re-order slides in a story

I want to move a slide in the story timeline but it is not possible.

Possible cause

You are using the mouse on a hybrid device.

Proposed action

Hold the mouse button pressed for a while before moving the slide.

Alternatively, use the touch screen instead and move the slide by long-touch and drag.

The data in my snapshot does not exist in the visualization

When I go to the source from a snapshot, I cannot see the same data in the visualization as in the snapshot.

Possible cause

The user who took the snapshot can access data you cannot, because of section access rights defined in the data load script.

Proposed action

Request the same section access rights for you in the script.

3   Publishing

Apps including sheets and stories can be published to streams to make content available to other users. Additional sheets and stories can be published as a part of an app that is already published. Access rights control which users are allowed to publish different kinds of content.

3.1   Publishing apps

When you publish an app, the sheets and stories of the app will become available to the other users that have access to the stream that your published app belongs to.

When your app is published, it will be locked. This means that others will not be able to edit your published sheets and stories, but can use them to analyze the data.

No one can edit the base sheets and base stories that were published with the app, but if you have the correct access rights, you can add private sheets and stories to a published app. You can use a published sheet or story as a template of a new one, by duplicating.

The image below illustrates how the state of a sheet can change in relation to a published app. It works identically for stories.
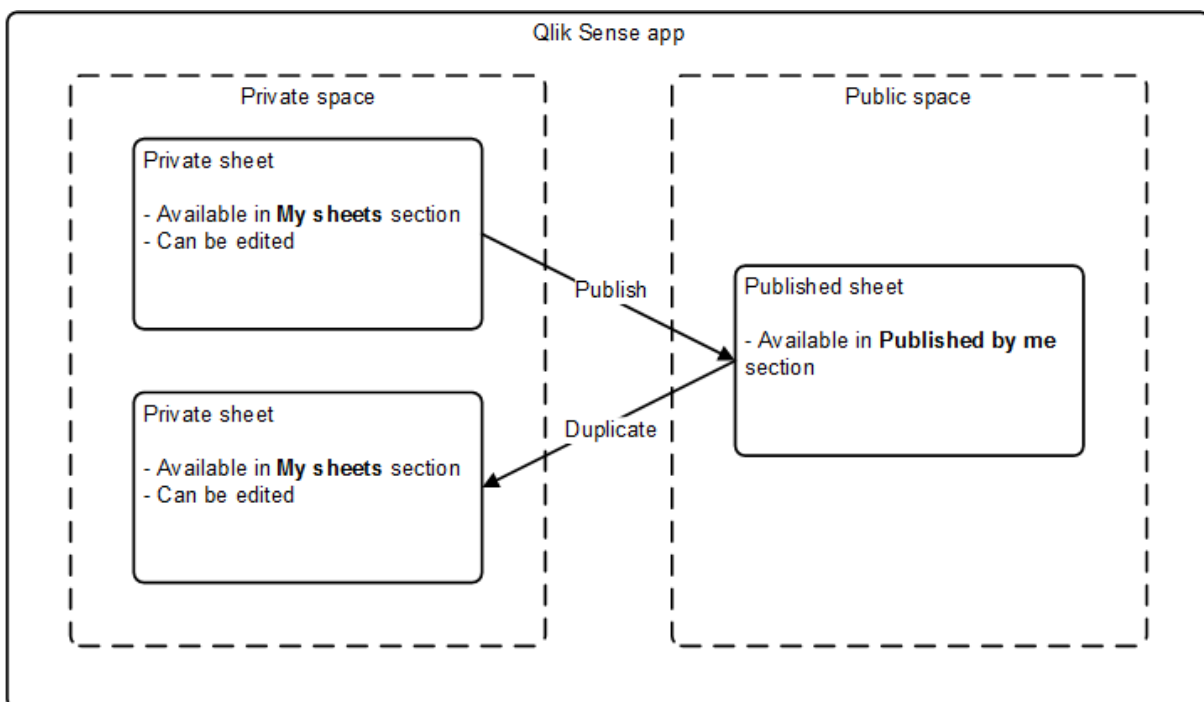
The possible states for a sheet added to a published Qlik Sense app.

When an app is published, only the master items and charts will be available in the assets panel when editing your private sheets.

Apps are published from the Qlik Management Console.

3.2   Publishing sheets and stories

The private sheets and stories that you create as a part of a published app can be published, to be made available to all other users of the published app.

When working with a published app, sheets and stories are organized in sections in the app overview depending on their status.

Base sheets / Base stories	Sheets and stories that were included in the app when it was published. All users of the app have access to these.
Published by me	Sheets and stories that you have created and then published so that all the users of the app can access them. The other users will find these in their **Community** section.
My sheets / My stories	Sheets and stories that you have created but not published. No one else can see these.
Community	Sheets and stories that someone else has created and published to the app that you have access to.

3.3   Unpublished app

What you can do

- Edit the load script and reload the data.
- View the data structure and details about the data from the data model viewer.
- Create, edit, and delete sheets, visualizations, and bookmarks.
- Create master items (dimensions, measures, and visualizations) for reuse.
- Navigate between sheets, stories, and bookmarks.
- Make and clear selections.
- Apply/recall bookmarks.

3.4   Published app

What you can do

- Navigate between sheets.
- Explore sheets and visualizations that were included in the app from the beginning.
- View stories that were included in the app from the beginning.
- Create and edit your own private sheets, visualizations and stories based on the data in the app.
- Publish sheets and stories that you have created so that others can use them.
- Unpublish sheets and stories that you have published so that they become private again.
- Update sheets that were published by you.
- Copy and paste visualizations between sheets.
- Use master items (dimensions, measures and visualizations) that were included in the app from the beginning.
- Create and edit your own private bookmarks.
- Make and clear selections.
- Apply/recall bookmarks.

What you cannot do

- Edit the load script or reload the data.
- Access the data model viewer.
- Edit visualizations, sheets, stories and bookmarks that were included in the app from the beginning.
- Edit sheets and stories that have been published.

3.5   Streams

The content in the hub is organized in streams. A stream is a collection of apps that a group of users has specific access to. The users of the stream can have different access rights. Some users might only be able to read the content in the stream, while others might have the rights to publish their content to the stream.

By default, Qlik Sense includes a stream called Everyone, which all users have both read and publish rights to.

All users have their own space, called **Work**, for their personal content, ensuring there is a clear separation between personal (not yet published) and trusted (published) information.

The read and publish rights on the streams are defined in the Qlik Management Console.

A toast notification is displayed, if a stream has been deleted or renamed.

> An app can only be published to one stream. To be able to publish an app to another stream the app must first be copied and then published to the second stream.
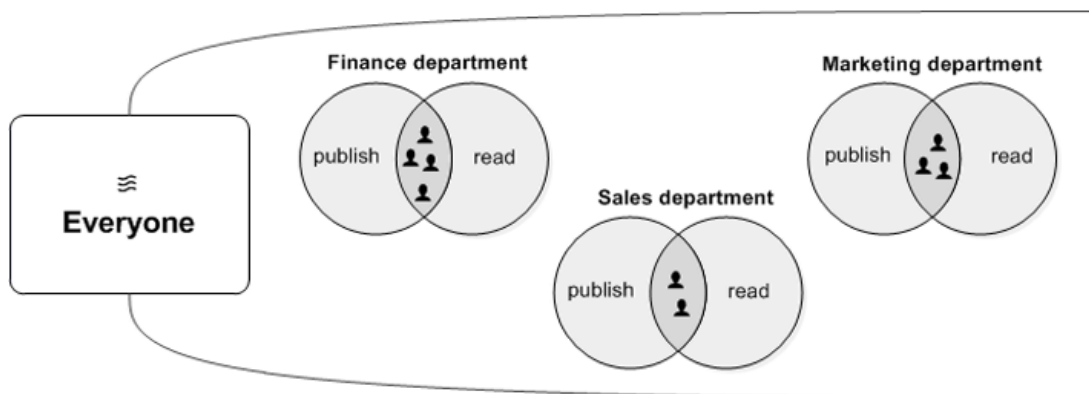
In this example there are different departments within a company. All users within all departments have both read and publish rights in the stream Everyone.
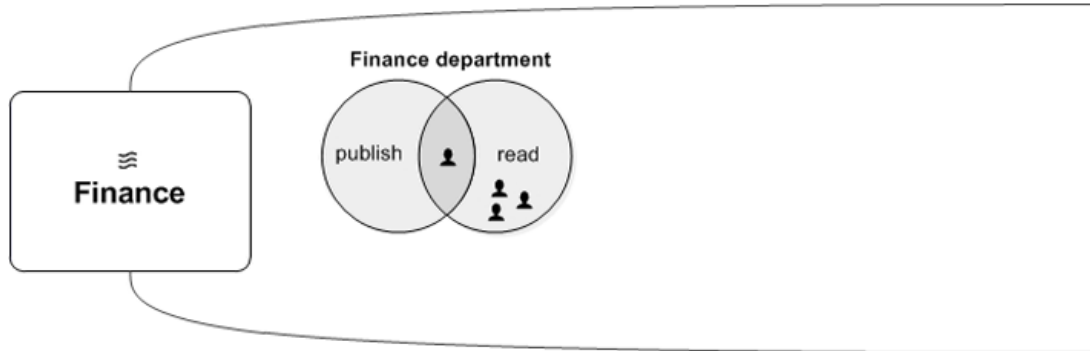
Only users who belong to the finance department have access to the stream Finance. Some of the users have both publish and read rights and some only have read rights.

3.6   Publishing a sheet

You can publish sheets that you have created, so that other users can view them.

> *You can only publish sheets as a part of an app that is already published.*

Do the following:

1. From the app overview, click ▥ to view the sheets.
2. Long-touch/right-click the sheet you want to publish and select **Publish**.
   The **Publish sheet** dialog appears.
3. Click **Publish**.

The sheet is published and moved from **My sheets** to **Published by me**.

Other users, with access to the same app, will find the published sheet in their **Community** section.

> *You can also publish a sheet in the sheet view by clicking ☰ and selecting **Publish sheet**, or by long-touching/right-clicking a sheet in the sheet navigator.*

3.7   Unpublishing a sheet

You can revert a sheet that you have published to being unavailable to others by unpublishing it.

Do the following:

1. From the app overview, click ▥ to view the sheets.
2. Find the published sheet under **Published by me**.
3. Long-touch/right-click the sheet and select **Unpublish**.
   The **Unpublish sheet** dialog appears.

4. Click **Unpublish**.
   The sheet is unpublished and moved from **Published by** me to **My sheets**.

The sheet is no longer available to other users of the app.

> *You can also unpublish a sheet in the sheet view by clicking* :≡ *and selecting* ***Unpublish sheet***, *or by long-touching/right-clicking a sheet in the sheet navigator.*

3.8   Publishing a story

You can publish stories that you have created, so that other users can view them.

> *You can only publish stories as a part of an app that is already published.*

Do the following:

1. From the app overview, click ⊡ to view the stories.
2. Long-touch/right-click the story you want to publish and select **Publish**.
   The **Publish story** dialog appears.
3. Click **Publish**.

The story is published and moved from **My stories** to **Published by me**.

Other users, with access to the same app, will find the published story in their **Community** section.

> *You can also publish a story in the storytelling view by clicking* :≡ *and selecting* ***Publish story***, *or by long-touching/right-clicking a story in the story navigator.*

3.9   Unpublishing a story

You can revert a story that you have published to being unavailable to others by unpublishing it.

Do the following:

1. From the app overview, click ⊡ to view the stories.
2. Find the published story under **Published by me**.
3. Right-click/long-touch the story and select **Unpublish**.
   The **Unpublish story** dialog appears.
4. Click **Unpublish**.
   The story is unpublished and moved from **Published by me** to **My stories**.

The story is no longer available to other users of the app.

> *You can also unpublish a story in the storytelling view by clicking* ☰ *and selecting **Unpublish story**, or by long-touching/right-clicking a story in the story navigator.*

3.10   Qlik NPrinting reports in Qlik Sense

Reports can distributed from Qlik NPrinting to the Qlik Sense hub for a named user who is part of the Active Directory user group in both Qlik Sense and Qlik NPrinting. The reports are private and can only be viewed by the user to whom they are distributed.

Reports can viewed from the hub by clicking **Reports**. Report formats include PDF, Excel, Word, and PowerPoint.

> *You cannot currently delete Qlik NPrinting reports from the Qlik Sense hub.*

> *Reports cannot be found with Qlik Sense search.*

Distributing Qlik NPrinting reports to Qlik Sense

You can schedule the distribution of Qlik NPrinting reports to Qlik Sense.

Before you begin:

To enable and configure the distribution of Qlik NPrinting reports to Qlik Sense, the following is required:

- Your Qlik NPrinting version is 17.1 or newer.
- Certificates (client.pfx, server.pfx, and root.cer) have been exported, by your Qlik Sense system administrator, from the Qlik Sense QMC. You have to include a secret key when exporting the certificates.
- The certificates have been installed, by the Qlik NPrinting administrator, on all computers where the Qlik NPrinting scheduler service is running.
- A firewall rule has been created allowing inbound connections on port 4243 of the Qlik Sense QRS.
- To configure report distribution in Qlik NPrinting, you need to be a Qlik NPrinting scheduler service user with **Publish** tasks authorization. The following information is also required:
  - the central node address for the Qlik Sense server. This is available from the Qlik Sense QMC under **Nodes**.

> *See the Qlik NPrinting help for more detailed procedures about installing certificates, and configuring report distribution from Qlik NPrinting to Qlik Sense.*

Do the following tasks in Qlik NPrinting to distribute reports:

1. Log into Qlik NPrinting as a user with **Publish** tasks authorization.
2. Select **Destinations** and then select **Hub**. Add the Qlik Sense hub as destination. You need the central node address for the Qlik Sense server.
3. Create a **Publish** task and then specify a Qlik NPrinting app, reports, users, schedule, and the hub as a destination.

Connecting to Qlik Sense apps in Qlik NPrinting

You can create connections from Qlik NPrinting to Qlik Sense apps. You can then use the data to create and design reports in Qlik NPrinting.

Before you begin

To enable and create connections from Qlik NPrinting to Qlik Sense apps the following is required:

- The same certificate requirements apply as those for distributing reports to from Qlik NPrinting to Qlik Sense. However, the certificates have to be installed on all Qlik NPrinting engine computers.
- A firewall rule has been created allowing inbound connections on port 4243 of the Qlik Sense QRS.
- To create a connection to a Qlik Sense app in Qlik NPrinting, you need to be an Qlik NPrinting user with **Connections** tasks authorization. The following information is also required:
   - the proxy address (full computer name) for the Qlik Sense server.
   - the Qlik Sense app id. This is available from the Qlik Sense QMC under **Apps**.
   - the Windows domain and user name of the Qlik Sense administrator. This is available from the Qlik Sense QMC under **Users**.

> *See the Qlik NPrinting help for more detailed procedures about installing certificates, and configuring connections from Qlik NPrinting to Qlik Sense apps.*

Do the following tasks in Qlik NPrinting to create a connection to a Qlik Sense report:

1. Log into Qlik NPrinting as a user with **Connections** tasks authorization.
2. Select the **Apps** drop-down list, and then select **Apps** from the list. Click **Create App** to create a new Qlik NPrinting app.
3. Select **Apps** and then select **Connections**. Click **Create Connection**, select the app that you just created, and then click Qlik Sense as your **Source**. You will require the following information to finish creating the connection:
   - the proxy address (full computer name) for the Qlik Sense server.
   - the Qlik Sense app id.
   - the Windows domain and user name of the Qlik Sense administrator.

3.11   QlikView documents in Qlik Sense

You can publish a link to a QlikView document in the Qlik Sense hub instead of distributing files by e-mail or to a specific folder location. You can use this method when you want to share a QlikView document with a named user that is part of the **Active Directory** user group in both QlikView and Qlik Sense.

In QlikView, the administrator must set up distribution to Qlik Sense.

Publishing links to QlikView documents in the Qlik Sense hub

You share links to QlikView documents in the Qlik Sense hub by using the QlikView Management Console. To view QlikView documents, log in to the Qlik Sense hub using the same credentials as the named user that the document was shared with. Select a link to a document in **QlikView documents** to open the QlikView AccessPoint in a new window. When viewing QlikView documents in Qlik Sense, no changes can be saved.

> *QlikView documents cannot be displayed using the mobile view for small devices.*

Before you begin

To enable the publishing of QlikView documents links, the following is required:

- Your QlikView version is 12.00 SR3 or newer.
- Your QlikView installation has a Publisher license.
- A different set of certificates (*client.pfx*, *server.pfx*, and *root.cer*) has been exported, by your system administrator, from the Qlik Sense Management Console to each of the QlikView Distribution Service (QDS) machines.
- Qlik Sense has been configured to allow shared content.
- The server connection to the QlikView AccessPoint has been configured to use the machine name.

Do the following in the QlikView Management Console to publish a link to a document:

1. Click the **Documents** tab.

   The **Source Document** page opens.

   > *Only source documents can be published.*

2. Expand a QDS machine instance and locate the document you want to share.
3. Click ⊕ to create a new task.
4. On the **Distribute** tab, click ⊕ to add a recipient.
5. Select the **Named User** user type.
6. Click 👥 to add a user.

*The named user must be part of the **Active Directory** user group in both QlikView and Qlik Sense.*

7. On the **Document Information** tab click ⊕ to add an attribute.
8. Type *ShowInSenseHub* in the **Name** field and *true* in the **Value** field.
9. Click **Apply**.
   The task may be run and will now add a link to the QlikView document in the Qlik Sense hub.

Links to QlikView documents cannot be deleted from the Qlik Sense hub.

QlikView certificate requirements

When creating a set of certificate for QlikView, the following is required:

- The certificates must be created using the full name, including the domain of the QDS machine.
- The certificates must be password protected.
- A secret key pair must be created.

Configuration details

The following topics provide details about the configurations needed when publishing QlikView document links in the Qlik Sense hub:

See: Configuring Qlik Sense to allow users to publish a link to shared content

See: Configuring the QlikView Distribution Service with the Qlik Sense certificates

See: Creating a task to publish a link to a QlikView document in the Qlik Sense hub

4   Exporting and printing

By allowing users to export and print sheets and visualizations, users can generate insights and share them with people outside the boundaries of a Qlik Sense system. For instance you can cooperate with customers and suppliers and take decisions based on selected data.

Exporting a sheet or a visualization is easy like to do a right click, customize some parameters and confirm. You don't need to create a template or to acquire technical skills. You can also select your preferred output format between PDF and images. PDF are easy to print.

> *On touch devices you can export sheets and visualizations but you cannot export stories.*

4.1   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.

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.

When you export tables from Qlik Sense, the resulting .xlsx files will have dimensions before measures, regardless of the order in the Qlik Sense table visualization. This is due to how the Qlik Sense engine service associates data. To work around this current limitation, create calculated dimensions from your measures and use the dimensions instead of measures in the table.

> *In filter panes with more than one dimension, you can either select all dimensions or a single dimension.*

Default limitations in number of rows and columns

The default maximum number of rows and columns in the Excel export file is:

- 1048566 rows per sheet. For pivot tables: 1048566 column dimensions. 10 rows can be added after the export.
- 16384 columns per sheet. If the number of columns exceeds the limit, the exported file is truncated and a warning message is sent.

4.2   Exporting a sheet

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

Do the following:

1. Open the sheet you want to export.

2. Click :≡ and select **Export sheet to PDF**.
   The **PDF settings** dialog appears.

3. Select the **Paper size** by scrolling the related drop down menu and clicking on the selected one.

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 72 dpi, the maximum is 300 dpi.

5. Choose the **Orientation** by selecting **Portrait** or **Landscape**.

6. In the **Aspect ratio options** you can select:

   - **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.

   - **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.

7. Click **Export** to start the creation of the image.

> *To create a paper copy of the sheet,you can print the PDF file.*

Exporting a sheet on touch devices

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

Do 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 one.

4. Choose the **Orientation** by selecting **Portrait** or **Landscape**.

5. Click **Export** to start the creation of the PDF.

6. To download the PDF, click on the link **Click here to download your PDF file**.

4.3   Exporting a visualization

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

Note that following types of objects cannot be exported:

- Filter panel
- KPI objects with a link to a sheet

Only the visible part of the visualization will be exported. For example, if you export a table that has scroll bars you will get an image, or a PDF, that shows the scroll bars and the window area that they specify, but not the entire table.

> *You can export a visualization extension (custom object), if the visualization extension is set up to allow it, and the security rules for your installation of Qlik Sense allow it.*

Export as an image

Do the following:

1. Right-click the visualization you want to export.
2. In the shortcut menu select **Export as an image**.
   The dialog **Image settings** appears.
3. Select to keep **Current** options or to change them by using **Custom** options.
   - Selecting **Current** 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.
   - You can customize the dimensions and the resolution of the exported image by clicking **Custom:**
     To set a new image width or height, click **+** or **-** to increase or decrease the width or height accordingly. You can also type an exact value. The minimum value is 8 pixels, the maximum is 2,000 pixels.

     > *The maximum size of an image that can be exported is 2,000 by 2,000 pixels. If the export would result in a larger image, you must reduce its size under* ***Custom***.

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

     To set a new image resolution, 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 72 dpi, the maximum is 300 dpi.
4. Click **Export** to start the creation of the image.

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 one.

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 72 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:

   - **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.

   - **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.

6. Click **Export** to start the creation of the image.

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

Exporting a visualization on touch devices

In Qlik Sense you can export a visualization as an image or a PDF file also from mobile devices.

On Android devices the download of an exported visualization is started in a new tab and, if the server doesn't have a trusted certificate, the download shows a security warning instead of prompting the user to start the download.

Export to PDF

When exporting from mobile devices, exporting to PDF is the default option.

Do the following:

1. Tap on the visualization you want to export to zoom it.

2. Click ☰ and select **Export**.
   Keep the default option **PDF** on the **Select type of file** drop-down menu.

3. Select the **Paper size** by scrolling the related drop down menu and clicking on the selected type.

4. Choose the **Orientation** by selecting **Portrait** or **Landscape**.

5. Click **Export** to start the creation of the PDF.

6. To download the PDF, click on the link **Click here to download your PDF file**.

Export as an image

Do the following:

1. Tap on the visualization you want to export to zoom it.

2. Click ☰ and select **Export**.

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

4. Click **Export** to start the creation of the image.

5. To download the image, click on the link **Click here to download your image file**.

4.4   Exporting a story

In Qlik Sense you can export a story as a PowerPoint presentation or a PDF file. The story will be exported with the selection states that were used to create the story, any selections applied while playing the story will be ignored.

> *This feature is not available on mobile devices.*

Export as a PowerPoint presentation

You can create a PowerPoint presentation from a story produced using the data storytelling feature.

Do the following:

1. Open the story that you want to export.

2. Click ☰ , and then select **Export story to PowerPoint**.
    The **PowerPoint settings** dialog appears.

3. If you want to change the default **Slide size** and **Resolution (dots per inch)**, make selections from the two drop-down lists.

4. The bottom line of the dialog shows the result of your settings.

5. Click **Export**.
    When the PowerPoint presentation is ready, a link will appear in the dialog.

6. Click the link.
    The presentation will be downloaded to the default download location for your browser.

7. Click **Cancel** to close the dialog.

Pre-configured PowerPoint slide sizes

By default, the exported presentation will have a slide size of 960 by 540 pixels with a widescreen aspect ratio of 16:9, and a resolution of 220 dpi (dots per inch).

You can choose from three pre-configured slide sizes and aspect ratios for your PowerPoint slides. A custom option is also available. These are the pre-configured slide sizes:

	Aspect ratio	Width (pixels)	Height (pixels)
Standard (4:3)	4:3	960	720
Widescreen (16:9) (default)	16:9	960	540
Widescreen (16:10)	16:10	960	600

Three resolutions are available: 220, 150, and 96 dpi.

Setting custom slide height and width

You can set the dimensions of the exported slides to values other than the pre-configured values by selecting **Custom** from the **Slide size** drop-down list in the **PowerPoint settings** dialog. If you do this, the dialog changes to allow you to set slide width and height in pixels.

Do the following:

- Click **+** or **-** to increase or decrease the slide height and/or width to your requirements. You can also type an exact value directly into the field.

> *To preserve the aspect ratio, make sure you adjust **Width (pixels)** and **Height (pixels)** accordingly.*

Export as a PDF

Do the following:

1. Open the story that you want to export.
2. Click :≡ , and then select **Export story to PDF**.
   The **PDF settings** dialog appears.
3. If you want to change the default **Paper size**, select it from the two drop-down lists.
4. To set a new image resolution, click **+** or **-** for **Resolution (dots per inch)** to increase or decrease the resolution accordingly. You can also type an exact value. The minimum value is 72 dpi, the maximum is 300 dpi.
5. Choose the **Orientation** by clicking **Portrait** or **Landscape**.
6. In the **Aspect ratio options**, you can select:
   - **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.
   - **Fit to page** to change the height and width of the visualization to fill the entire page. Aspect ratio will change accordingly.
7. The bottom line of the dialog shows the result of your settings.
8. Click **Export**.
   When the PDF presentation is ready, a link will appear in the dialog.
9. To download the PDF, click **Click here to download your PDF file**.
   The presentation will be downloaded to the default download location for your browser.
10. Click **Cancel** to close the dialog.

4.5   Troubleshooting - Exporting

This section describes the problems that can occur when exporting data or stories in Qlik Sense.

I cannot export all my data

I tried to export data from my visualization, and got the following message:

Your exported data is ready for download. Please note that your dataset was too large and has been truncated.

Possible cause

The data in your visualization is too large to export.

Proposed action

Make selections to limit the data you want to export and then export again.

The commands to export a visualization to PDF or image are missing

I tried to export a visualization, but the commands **Export as image** and **Export to PDF** are missing from the shortcut menu.

Possible cause

The type of visualization you want to export is a visualization extension (a custom object) that has not been set up to be exported, or your Qlik Sense security rules do not allow it.

Proposed action

Refer to your system administrator.

I cannot export a visualization as an image

I tried to export a visualization as an image, but the export failed.

Possible cause

The visualization you want to export is too large. The maximum size an exported image can be is 2,000 by 2,000 pixels.

Proposed action

In the **Image settings** dialog, as you export, choose the **Custom** button and set the image size to 2,000 by 2,000 pixels.

I have blank characters in PDF files

I have blank characters in PDF files that were created when exporting stories with labels in Japanese, Korean, Simplified Chinese, or Traditional Chinese.

Possible cause

Exporting a story with these languages requires the appropriate font, or else the default Times New Roman font will be used. Times New Roman does not support Japanese, Korean, Simplified Chinese, or Traditional Chinese.

This only applies to text in title or paragraph objects in the story. It does not apply to embedded visualizations.

If ja, ja-JP, ko, ko-KR, zh-CN, zh-TW is declared in the CollationLocale setting for the application in the Data Load Editor, the exporting feature will use the first available font from the following ordered lists to generate the PDF:

CollationLocale language	Font stack
Chinese Simplified	SimSun, SimHei, FangSong
Chinese Traditional	PMingLiU, MingLiU, Microsoft JhengHei, Microsoft JhengHei UI
Japanese	Meiryo, Meiryo UI, Yu Gothic, Yu Gothic UI, MS UI Gothic
Korean	Malgun Gothic, BatangChe

If a font from the above list is not found, characters in your story requiring a Chinese, Korean or Japanese font will not be printed. There will just be a blank space.

Proposed action

Install one of the fonts used to export PDF for the language that you are using. You cannot choose the font because the system will only use those in the table in the specified order.

Make sure that you use labels that are the same language that you set in the CollationLocale. If they differ, only common characters will be correctly rendered in the created report.

Right to left languages, like Arabic or Hebrew, are not currently supported on labels.