Qlikview 11 Workshop

WITH ECRAFT DATA FROM SPECIAL LECTURE SEP 2015

RALF REHN

The target of the Workshop

- To create a data model using the training material from the ECraft lecture (EXTRACT)
  - 5 Excel files
- To have the system create necessary relations
- To enhance analyzing by creating new fields (TRANSFORM)
  - Year
  - Month
- To create some analyzing objects
- To answer some business questions

Things you need

- Download from Moodle the files
  - Salesdata
  - Customers
  - Customeraddress
  - Division
  - Region
- In Moodle also the corrected files
  - Customers_corrected
  - Customeradress_corrected

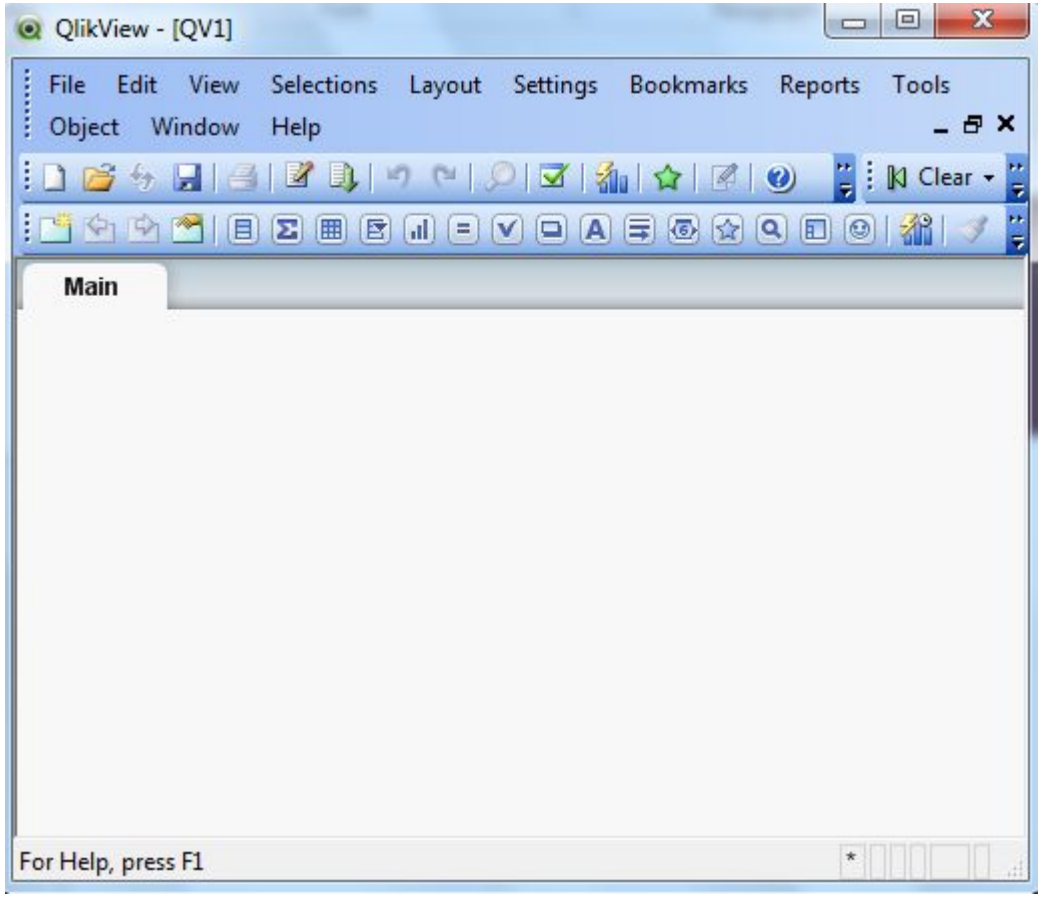
1. Create a Qlikview 11 file

- **Locate Qlikview 11 on the computer**
- **and start it**

- **File – New**
- Abort the wizard by **Cancel**

- You have a empty Qlikview file

- **File – Save** – give a location and name



3. Extract the files into Qlikview

- 3.a **File - Edit Script**
- 3.b Choose **Table files** – Locate file - **Open**
- 3.c Check the settings depending on file and file structure
  - Excel file
  - Labels – Embeddes labels (means first row headers)
- 3.d Either **Finish** or go thru next screens by **Next** until end
- 3.e **Note** the SQL statement in the script
- 3.f **Rename** the datasource by adding a row affer Directory end the name by : - example Salesdata:
- 3.g **Exit Edit script** with **Ok**, **IMPORTANT!** before loading data **FILE** - **SAVE**
- 3.h Read the datasource into memory by **File – Reload**
- Check the your data model by File **– Table Viewer**

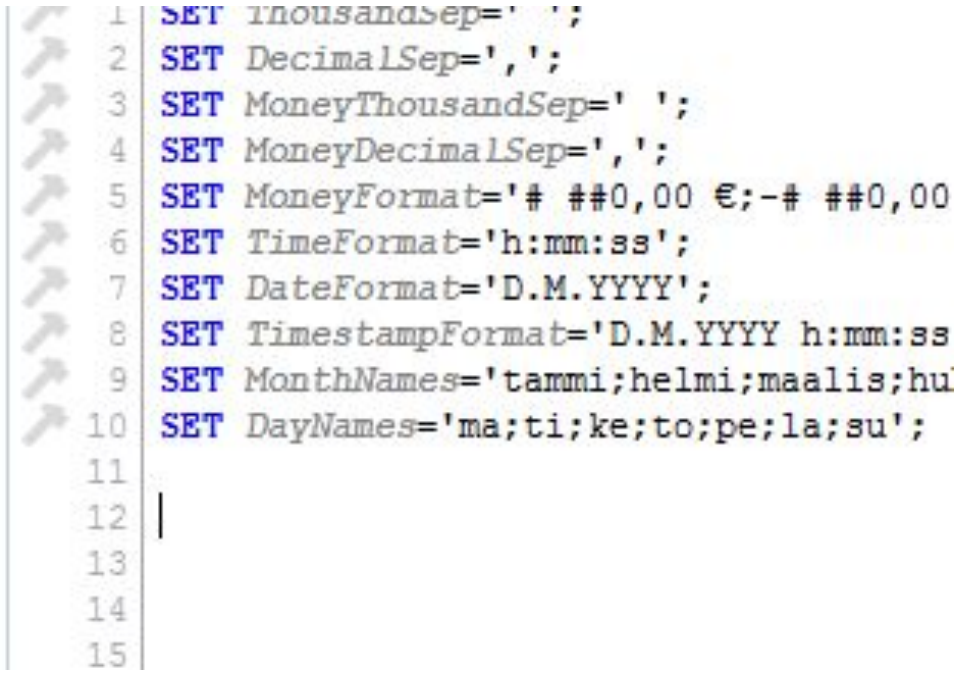
- Repeat for all files

3.a Editing the script

File - Edit Script

Ensure the cursor is on a empty row like in the picture

Choose **Table files** – Locate file – **Open** to add a new datasource to the model

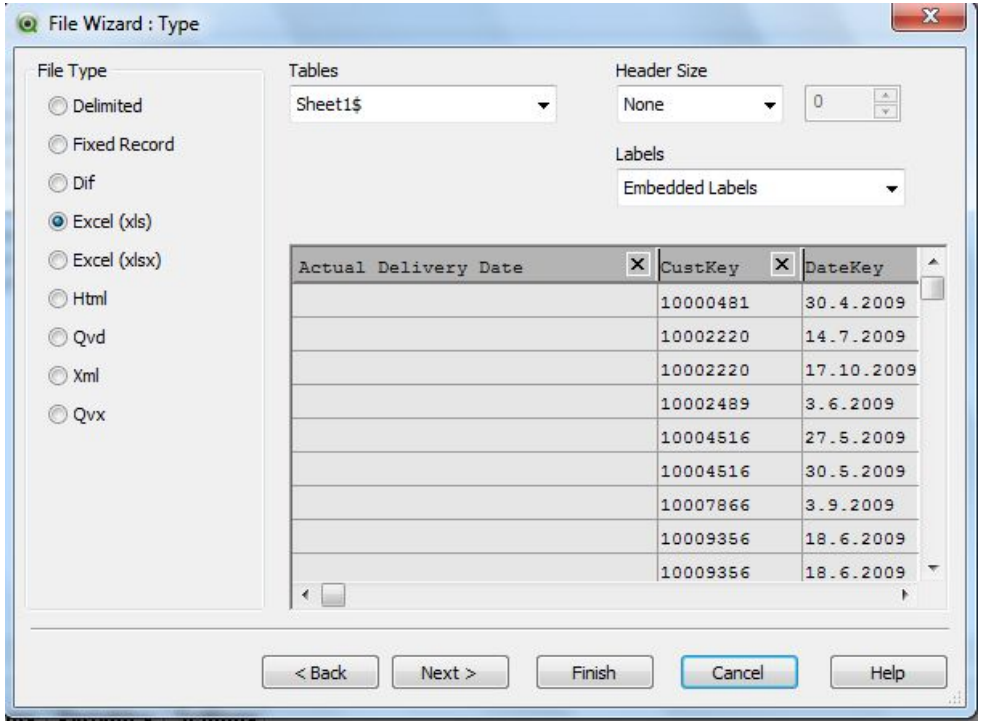


3.c Check the settings

Check the settings depending on file
and file structure
- Excel file
- Labels – Embeddes labels (means first row headers)

Either **Finish** or go thru next screens by **Next** until end

NOTE: Files Region and Division
need change in settings to Embedded Labels



3.e **Note** the SQL statement in the script

The script contains now the instructions

For reading the data from the source

The script can be altered to do

Transformations on data

```
Directory;
LOAD [Actual Delivery Date],
     CustKey,
     DateKey,
     [Discount Amount],
     [Invoice Date],
     [Invoice Number],
     [Item Class],
     [Item Number],
     Item,
     [Line Number],
     [List Price],
     [Order Number],
     [Promised Delivery Date],
     [Sales Amount],
     [Sales Amount Based on List Price],
     [Sales Cost Amount],
     [Sales Margin Amount],
     [Sales Price],
     [Sales Quantity],
     [Sales Rep],
     [U/M]
FROM
```

3.f **Rename** the datasource

Rename the datasource
by adding a row after Directory
End the name by :

- example Salesdata:

```
2  Directory;
3  Salesdata:
4  LOAD [Actual Delivery Date],
5       CustKey,
6       DateKey,
7       [Discount Amount],
```

This is done to easier identify the source when working with the model

3.g Save File before contnuing

Exit Edit script with **Ok**

IMPORTANT!

before loading data **FILE** – **SAVE**

(If there is errors in script you could loose the changes since last Save)

43.h Load the data and check the data model

Read the datasources into memory (actually executes the script!)

by **File – Reload**

Check your data model

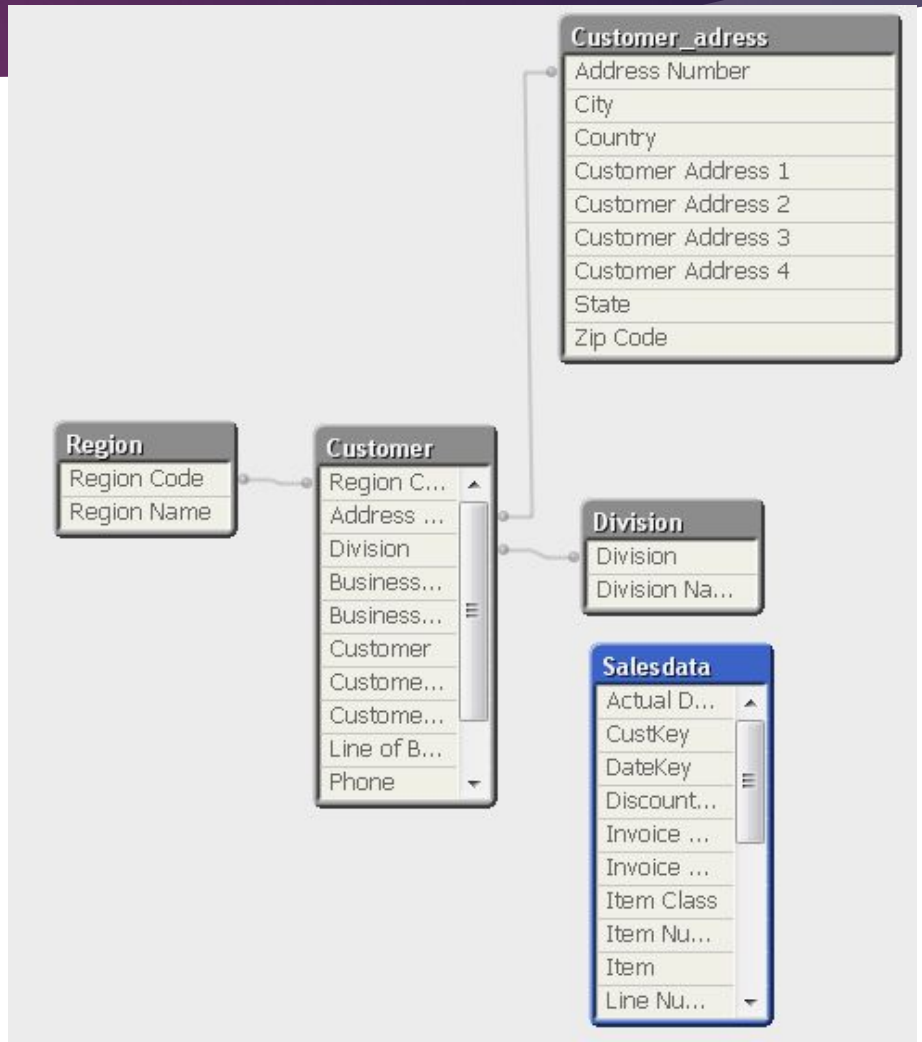
by File **– Table Viewer**

4. The Data model after all files loaded

Qlikview created automatically the releationships based on **common field names**

However as Salesdata and Customer do not have a common field No relation created

We need to edit the script



5. Relate Salesdata and Customers

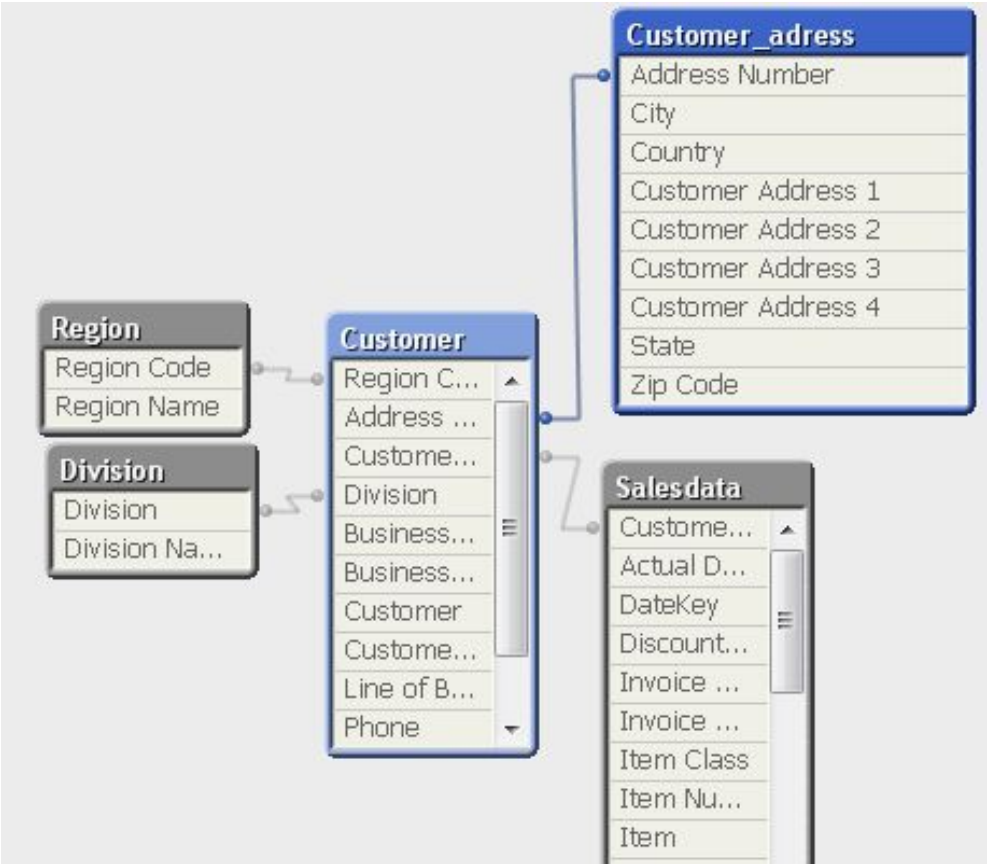
Exercise - Transform

- Access the Table Viewer to check the current data model. Note that the Salesdata table is currently not linked
- Access the Script Editor
- Link the Sales and Customer Tables
    - Locate the field [Customer Number] in the Customer table and copy the name
    - Locate the field CustKey field in the Salesdata table and rename it Customer Number
- CustKey AS [Customer Number],

From Tuukka Sarkkis presentation material

6. Edit Script, Save ,Reload and check model again

```
Directory;
Salesdata:
LOAD [Actual Delivery Date],
     CustKey as [Customer Number],
     DateKey,
     [Discount Amount],
```



7. Add new calculated fields

- Create the Year and Month fields based on the [Invoice Date] using the Year and Month functions
  - Copy the [Invoice Date] in the Salesdata table
  - On a new line in the script type:
  - Year([Invoice Date]) as Year
  - Month([Invoice Date]) as Month

From Tuukka Sarkkis presentation material

8. Change the script

```
Directory;
Salesdata:
LOAD [Actual Delivery Date],
     CustKey as [Customer Number],
     DateKey,
     [Discount Amount],
     [Invoice Date],
     Year([Invoice Date]) as Year,
     Month([Invoice Date]) as Month,
     [Invoice Number],
     [Item Class],
```

Note this is standard SQL query lanquage check for instance out http://www.w3schools.com/sql/

9. The datamodel is ready

- After **Save** and **Reload**

The business question

- How much has
  - The Customer "A1 Store"
  - bought
  - In June 2008
  - of Item "Even Better Blueberry Yogurt"
- ??
- Answer = Even Better Blueberry Yogurt 18870,57

10. Analyzing the data

- Add objects to the sheet
- Add sheets if wanted
- Save in between

- You can reset all filters with
- Clear in the ment

10. Analyzing the data

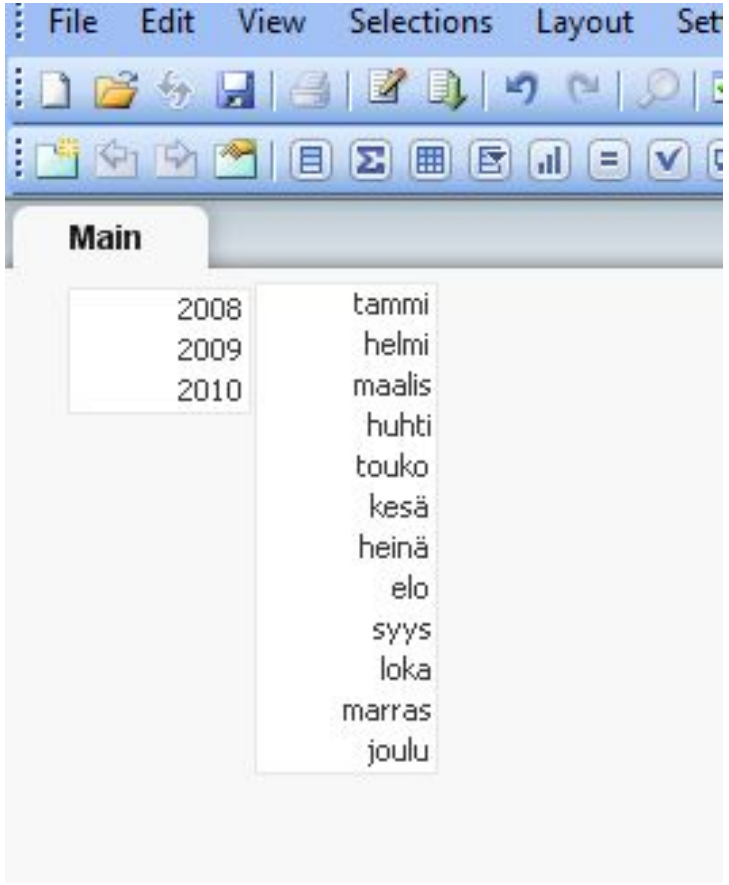
Exercise- Interface

Exercise - Listboxes as Calendar

- Right click in sheet and select option Select Fields
- Select Year and Month
- Access Properties - Presentation and uncheck the single column option for both listboxes
- De-select Show Caption on the Captions tab
- Resize and place the two listboxes across the top of the sheet

From Tuukka Sarkkis presentation material

10. Calendar options created

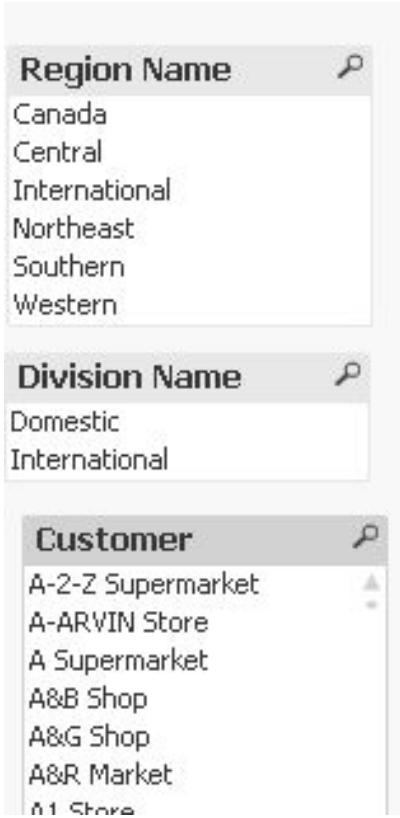


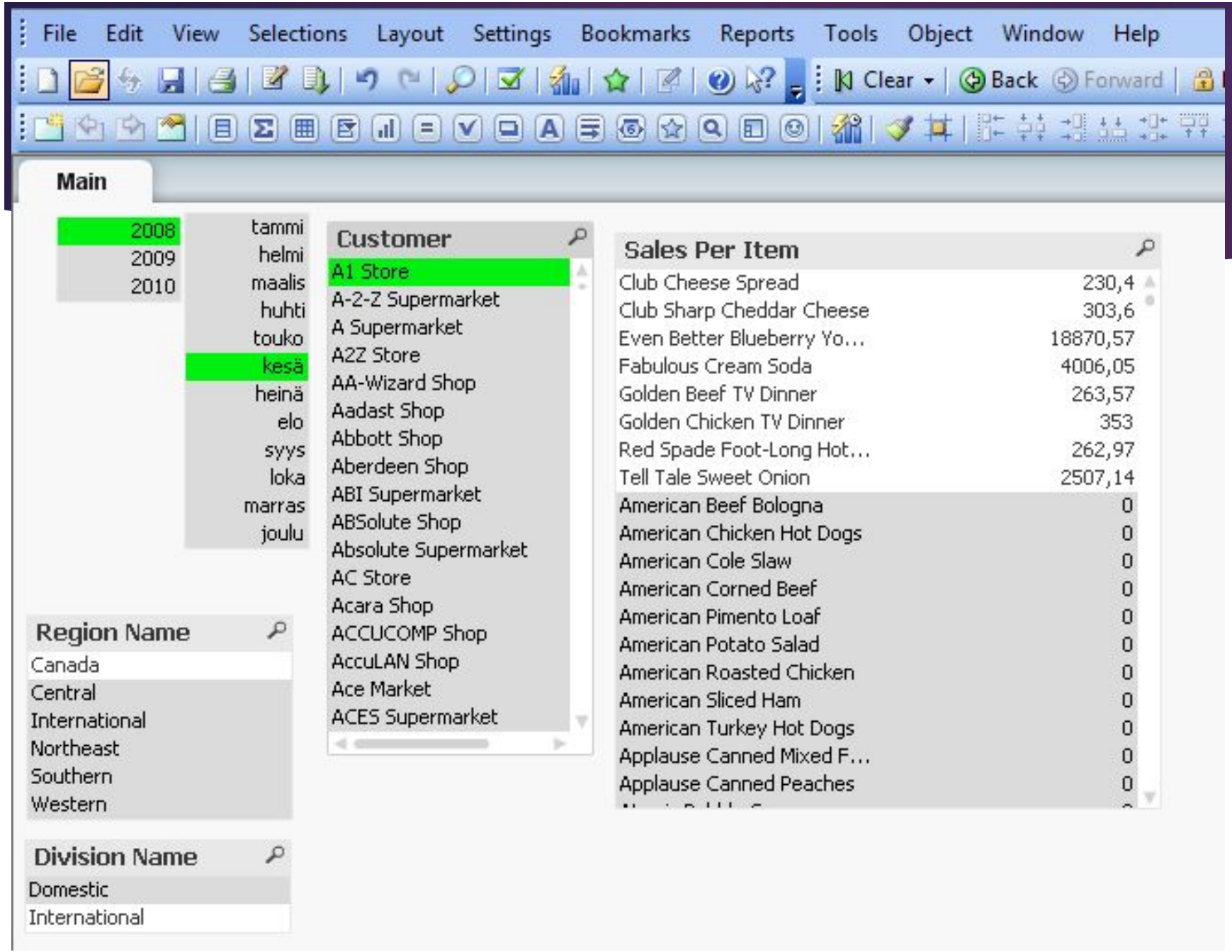
10. Create Item/sales amount

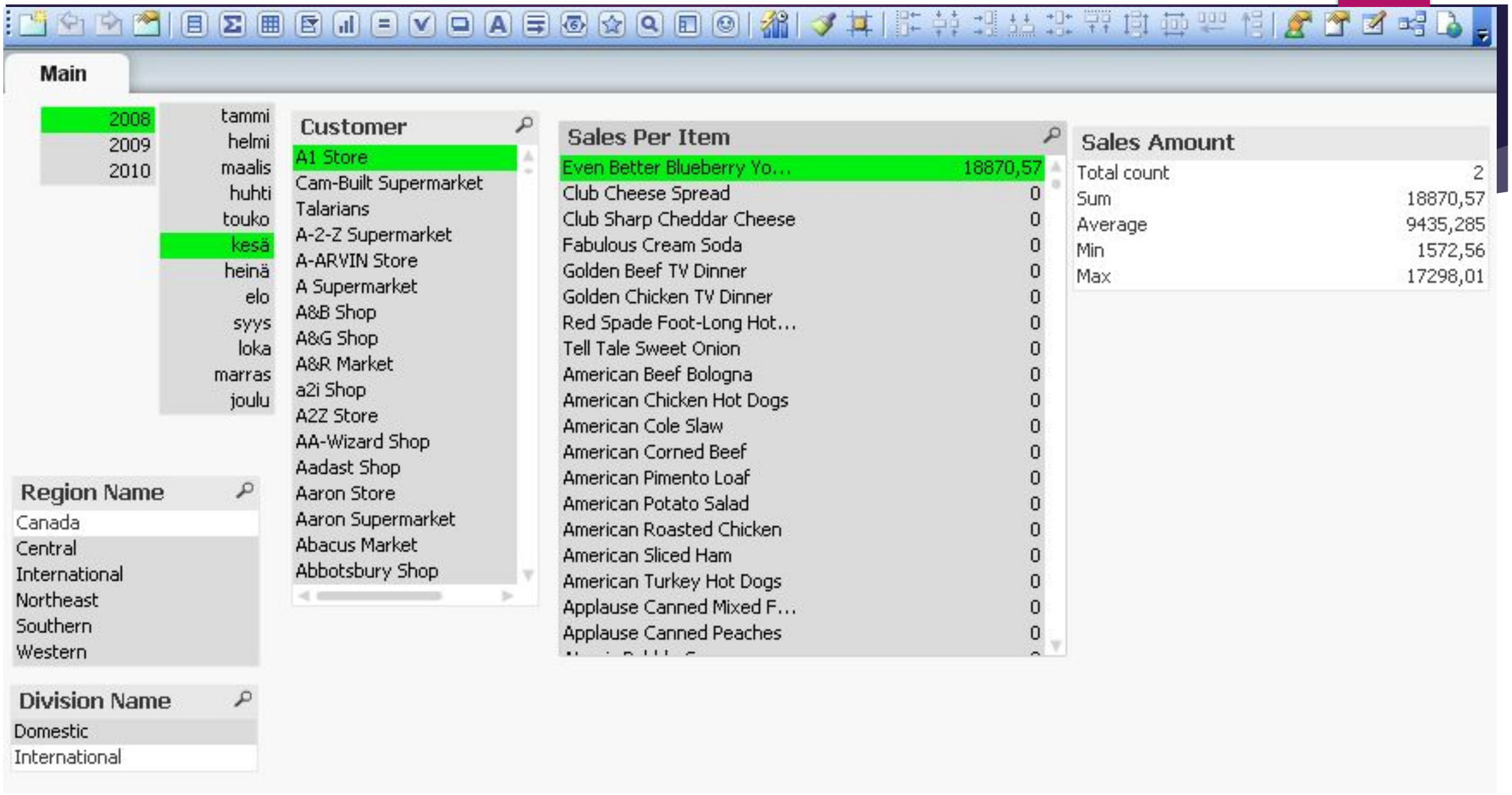
- **Right click** on Sheet – choose **New Sheet Object** – **Listbox**
- **Tab General**
  - **Title** "Sales per Item"
  - In **Field** choose **Item**
- **Tab Expressions**
  - **Add**
  - **Create formula** sum([Sales Amount])
  - Press **Ok**
- **Tab Number**
  - Coose format **Money**
- **Ok and resize object**

10. Add Customer , Region name , Division name

- Leave the caption
- Move and resize objects




File Edit View Selections Layout Settings Bookmarks Reports Tools Object Window Help
Clear
Back
Forward
Main
2008
2009
2010
tammi
helmi
maalis
huhti
touko
kesä
heinä
elo
syys
loka
marras
joulu
Customer
A1 Store
A-2-Z Supermarket
A Supermarket
A2Z Store
AA-Wizard Shop
Aadast Shop
Abbott Shop
Aberdeen Shop
ABI Supermarket
ABSolute Shop
Absolute Supermarket
AC Store
Acara Shop
ACCUCOMP Shop
AccuLAN Shop
Ace Market
ACES Supermarket
Sales Per Item
Club Cheese Spread 230,4
Club Sharp Cheddar Cheese 303,6
Even Better Blueberry Yo... 18870,57
Fabulous Cream Soda 4006,05
Golden Beef TV Dinner 263,57
Golden Chicken TV Dinner 353
Red Spade Foot-Long Hot... 262,97
Tell Tale Sweet Onion 2507,14
American Beef Bologna 0
American Chicken Hot Dogs 0
American Cole Slaw 0
American Corned Beef 0
American Pimento Loaf 0
American Potato Salad 0
American Roasted Chicken 0
American Sliced Ham 0
American Turkey Hot Dogs 0
Applause Canned Mixed F... 0
Applause Canned Peaches 0
Region Name
Canada
Central
International
Northeast
Southern
Western
Division Name
Domestic
International



- Statistics box added

Reloading corrected files

- Save
- Locate correct files and change the reference in the script
  - Regards to Customer
  - Regards to Customeraddress
- The reload and if Ok then Save !

11. Correct the reference

```
     [Search Type]
FROM
[..\____b_New_Intro_course\ECraft\HeliaDemo\DATA\CUSTOMERS.xls]
(biff, embedded labels, table is [CUSTOMERS$])where exists ([Customer Number]);
```

```
      [Search Type]
FROM
[..\____b_New_Intro_course\ECraft\HeliaDemo\DATA\CUSTOMERS_corrected.xls]
(biff, embedded labels, table is [CUSTOMERS$])where exists ([Customer Number]);
```

```
Craft\HeliaDemo\DATA\CUSTOMERADDRESS.xls]
e is [CUSTOMERADDRESS$]);
```

```
raft\HeliaDemo\DATA\CUSTOMERADDRESS_corrected.xls]
is [CUSTOMERADDRESS$]);
```

Additional Questions

- What products where sold the most in 2009? (Value)
- What Customer bought the most in 2008? (Value)

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