Data Exchange Reports - Story

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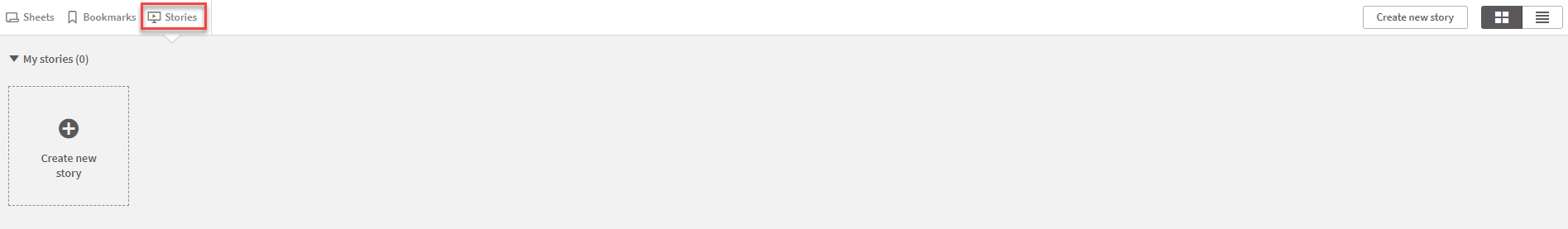
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# What is a story?

The Data Exchange reports allow you to create presentations, called **Stories**, based on the Data Exchange (DEX) data you can access. You create Stories by incorporating elements of the Data Exchange report, such as taking a snapshot of a table or chart, and adding them in your presentation to tell a “story” about the data your organisation is working with. You can also create animations and add shapes to make your Story more engaging.

To start, choose a report that interests you. On the report page, you can access your stories by clicking on the **Stories** tab of the report, as per **Figure 1** below.

**Figure 1 – Stories pop up box**



You can find more information on how to use Data Exchange reports at the [Tutorials](https://help.qlik.com/en-US/sense/2.2/Content/Tutorials.htm) page on the [Qlik website](https://help.qlik.com/en-US/).

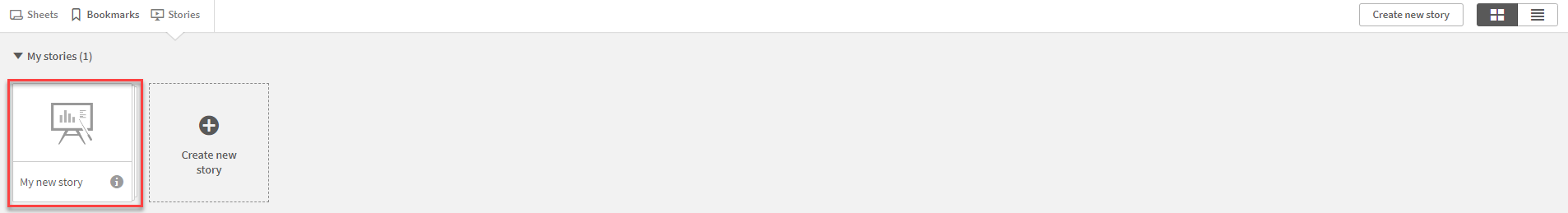
1. Add items to a Story

**Table 1 – Add a new My story navigation icons**

| **ITEM** | **DESCRIPTION** |
| --- | --- |
| Play button | Select the **Play** button to play your story. |
| Camera icon | Select the **Camera icon** to select an image from your snapshots to insert into your story. |
| A icon to insert text | Select the **A** icon to insert text into your story. |
| Shapes icon | Select the **Shapes** icon to select different shapes to insert into your story. |
| Animation icon | Select the **Animation** icon to animate your shape or image in your story. |
| Media icon | Select the **Media** icon to select media objects to insert into your story. |
| Add slide button | Select the **Add slide** button to add a new slide to your story. |
| cut icon | Select the **Cut** icon to remove an item from your story slide. |

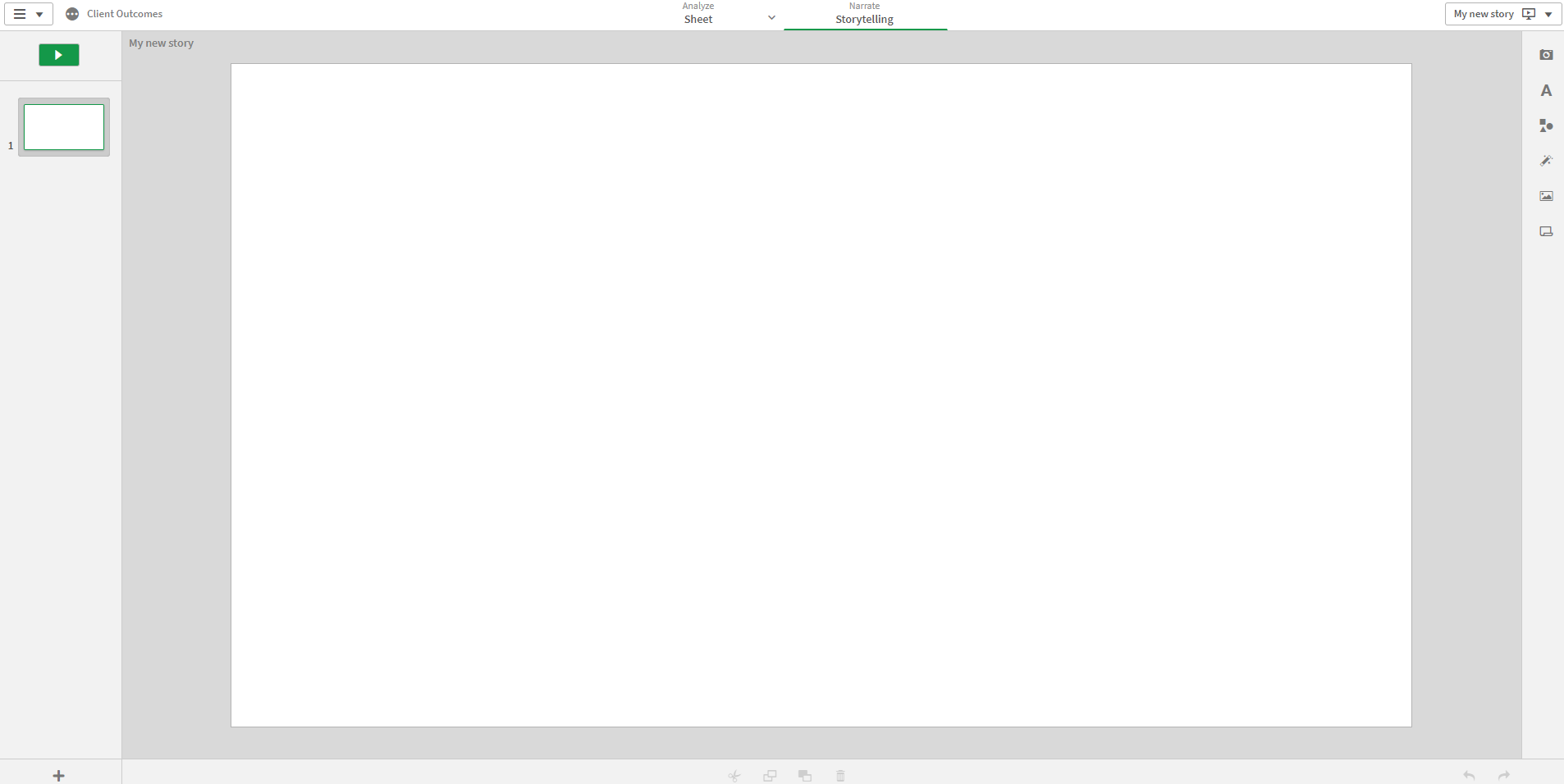
On the **Stories** page of the report you are interested to use, choose the Story you are want to work with, or create a new one. You can have multiple Stories.

**Figure 2 – Stories pop up box**



The **Story page** will display.

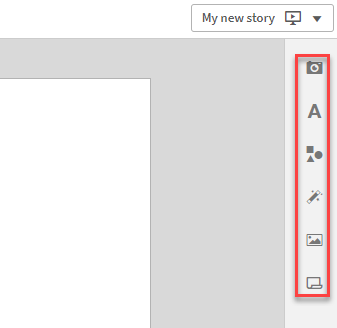
**Figure 3 – Story page**



The DEX reports allow you to add different items to a story. This can include animations, media, shapes, sheets (pages), snapshots and text.

Within your Story page, add items to the story, as required, by selecting the appropriate icon.

**Figure 4 – Add items icons (Refer Table 1)**



1. Add a sheet (page) to the story

**Table 2 – Add a page navigation items**

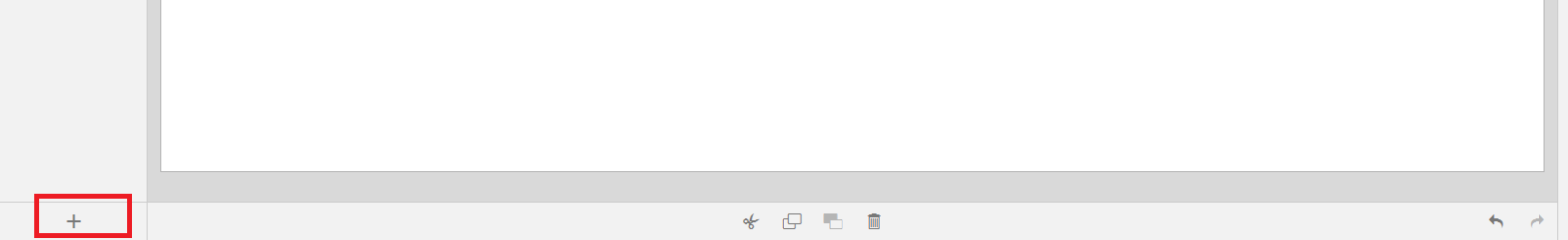
| **ITEM** | **DESCRIPTION** |
| --- | --- |
| A screenshot of the sheet icon as it appears in the story. | Select the **sheet** icon toinsert a new sheet into the story. |
| This is a screen shot of the sheet left-aligned icon to insert the image on the left hand side and add text on the right hand side. | Select the **sheet left-aligned** icon to insert the image on the left hand side and add text on the right hand side. |
| Select the sheet centre-aligned icon to insert the image on the centre of the sheet. | Select the **sheet centre-aligned** icon to insert the image on the centre of the sheet. |
| Select the sheet right-aligned icon to insert the image on the right hand side and add text on the left hand side. | Select the **sheet right-aligned** icon to insert the image on the right hand side and add text on the left hand side. |
| This is a screen shot of the add page icon. | Select the **blank** icon to insert a blank sheet. |

Within your Story page, you can add sheets (pages) to your Story. There are 2 different methods in order to do that.

* 1. Method 1 – Insert a blank sheet to a story

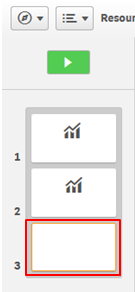
Select the This is a screen shot of the add page icon. icon on the bottom left of the story page.

**Figure 5 – Add a page to the story icon**



The additional slide will display in the side panel.

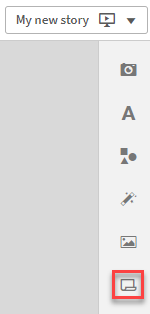
**Figure 6 – Add an additional slide**

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* 1. Method 2 - Insert a live data Base sheet from a report

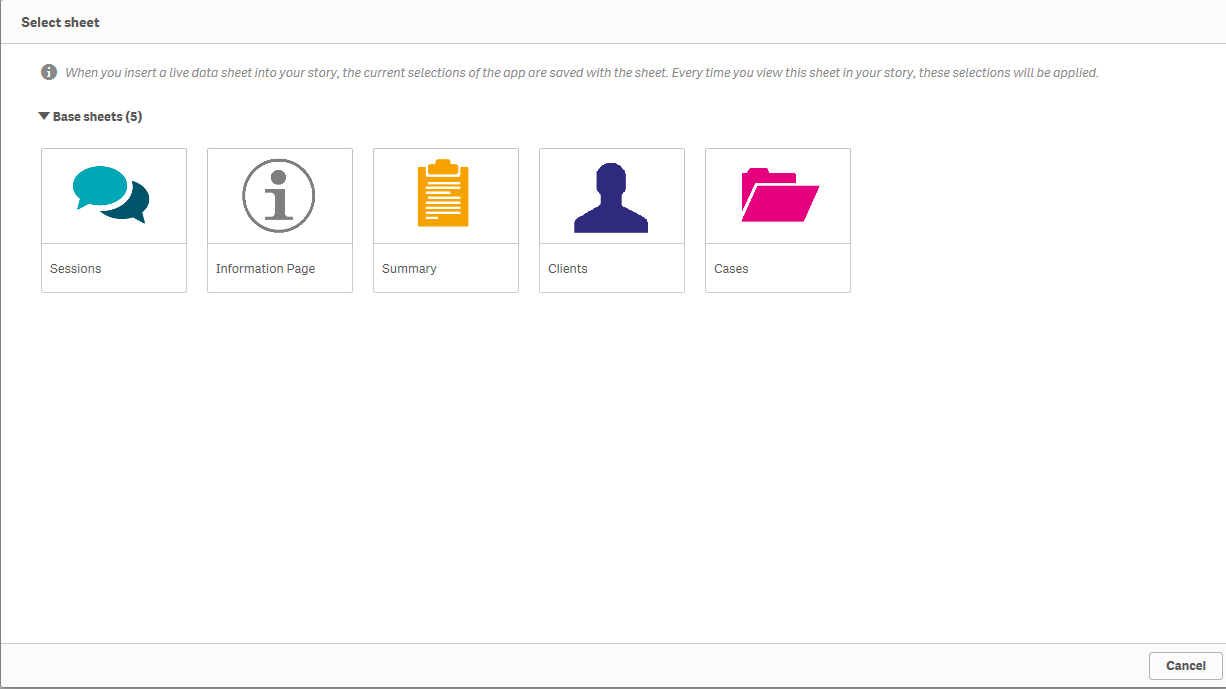
Select the A screenshot of the sheet icon as it appears in the story. icon from the functions bar found on the right-hand side of the Story page.

**Figure 7 – Insert Items panel**



The **Select sheet** pop up box will display with the available **Base** sheets for the report.

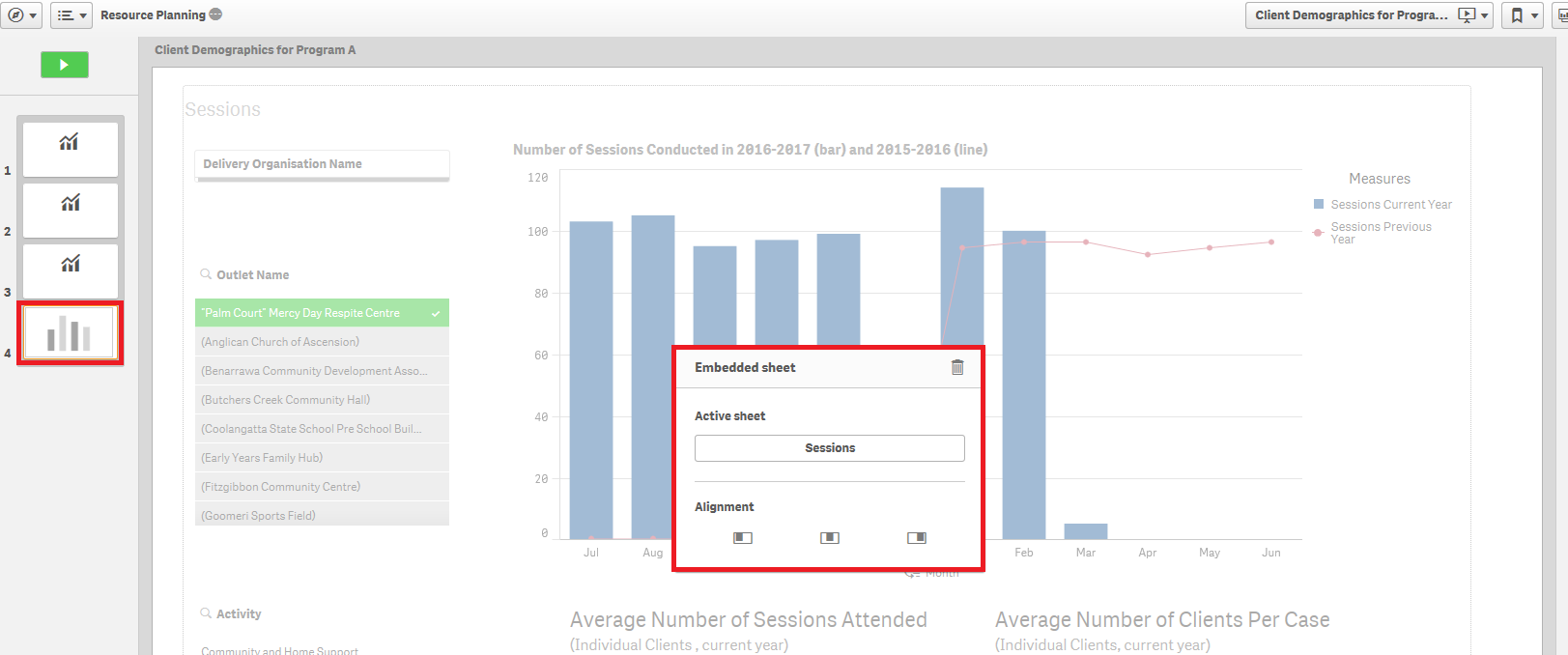
**Figure 8 – Select sheet pop up box**



Select the required **Base** sheet.

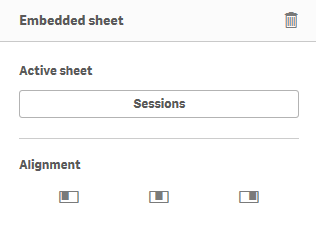
The selected sheet will be inserted into the Story and the **Embedded sheet** pop up box will display.

**Figure 9 - Selected Base sheet with Embedded sheet pop up box**



Select the appropriate **Alignment** icon for the inserted live data Base sheet.

**Figure 10 - Embedded sheet pop up box**



The current selections of the report are saved with the selected Base sheet. Every time you view this sheet in your story, the selections at that saved point of time will be applied.

1. Add text to the story

In your Story, you can add text by using the **Text objects** selections.

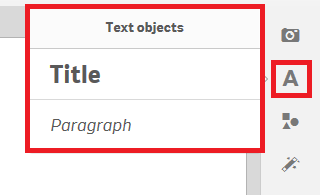
**Table 3 – Title and Paragraph boxes navigation items**

| **ITEM** | **DESCRIPTION** |
| --- | --- |
| This is a screen shot of the edit icon. | Select the **edit** icon to display the different edit options available. |
| **Within the Title box** | |
| Drop down arrow | Select the **drop down arrow** near the colour box to choose the font colour. |
| B, I or U button | Select **B*, I*** or **U** to make the text bold, italic or underlined. |
| Hyperlink button | Select the **hyperlink** icon to link a URL to the text. |
| Crosshair handles | Select the **handles** on the corner of the text box to resize the text box. |
| **Within the Paragraph box -** You can perform the functions available in the Title text box, as well as: | |
| Alignment buttons | Select the **alignment** options to change the alignment of the text. |
| Font size drop down arrow | Select the **font size drop down arrow** to change the size of the text. |

After selecting the Story you would like to work on, you will land on the story page (**Figure 3**). You can then add textto the story page by selecting This is a screen shot of the Add text icon. within the item functions bar found on the right-hand side of the Story page.

The **Text objects** pop up box will display.

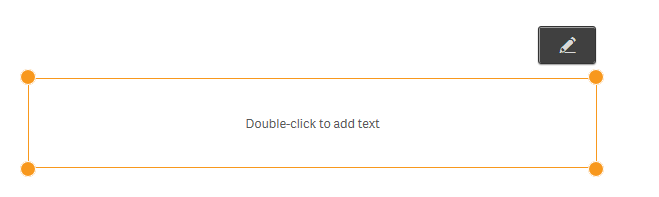
**Figure 11 – Text objects pop up box**



Double click on the displayed options to add either a **Title** or a **Paragraph** text box.

**Example of Title box:**

**Figure 12 – Example of a Title box**



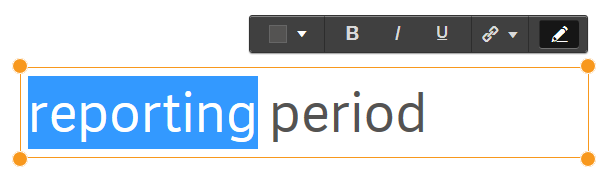
Select This is an image of the pencil icon. to display the **Edit** options.

Use This is a screen shot of the handles that can be used to resize and move the image anywhere on the page. to resize or move the image anywhere on the page.

Click and drag the text box where ever you want on the page.

Highlight the required text to amend the font size, style, colour or to add a hyperlink.

**Figure 13 – Amending the text icons**



**Example of Paragraph box:**

**Figure 14 – Example of a Paragraph box**



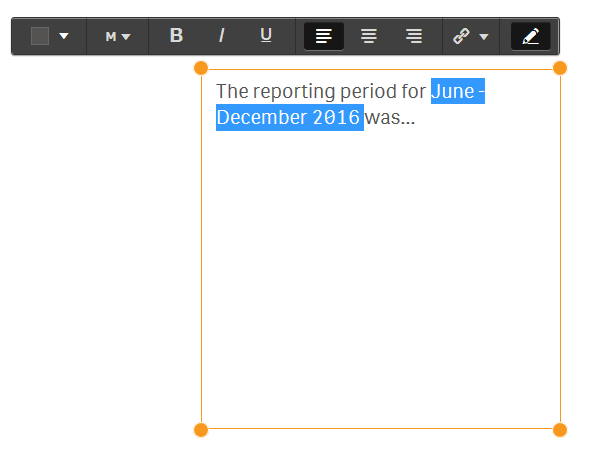
Select This is an image of the pencil icon. to display the **Edit** options.

Use This is a screen shot of the handles that can be used to resize and move the image anywhere on the page. to resize or move the image anywhere on the page.

Click and drag the text box where ever you want on the page.

Highlight the required text to amend the font size, style, colour, positioning or to add a hyperlink.

**Figure 15 – Amending the paragraph icons**

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1. Add animations to a story

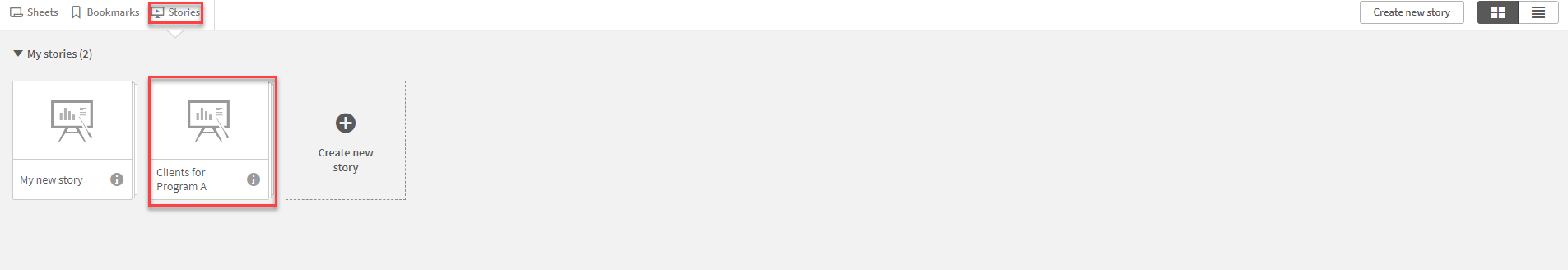
You are able to add animations to your story by using the **Effects library**. These visual effects can only be used on bar charts, line charts and pie charts.

**Table 4 – Effects library navigation items**

| **Item** | **Description** |
| --- | --- |
| Highest value button | Select the **Highest value** icon effect will make the highest value stand out by adding a label to the highest value and dimming the other values. For visualizations with grouped values, the highest value in each group will be highlighted |
| Lowest value button | Select the **Lowest value** icon effect will make the lowest value stand out by adding a label to the lowest value and dimming the other values. For visualizations with grouped values, the lowest value in each group will be highlighted. |
| Any value button | Select the **Any value** icon effect will make a value, that you select manually, stand out by adding a label to the selected value and dimming the other values. For visualizations with grouped values, you can choose to highlight either a measure or a dimension. The selected measure or dimension will be highlighted in all the groups where it occurs. |
| Replace button | Select to **replace** the image with another snapshot item in your Stories library. |
| Edit button | Select to **edit** the image. |
| Lock button | Select **lock** to prevent any changes being made to the snapshot. |
| Go to source button | Select to **go to** the originating sheet source of the snapshot. |
| Return button | Select to **return** to the Story that you are creating. |

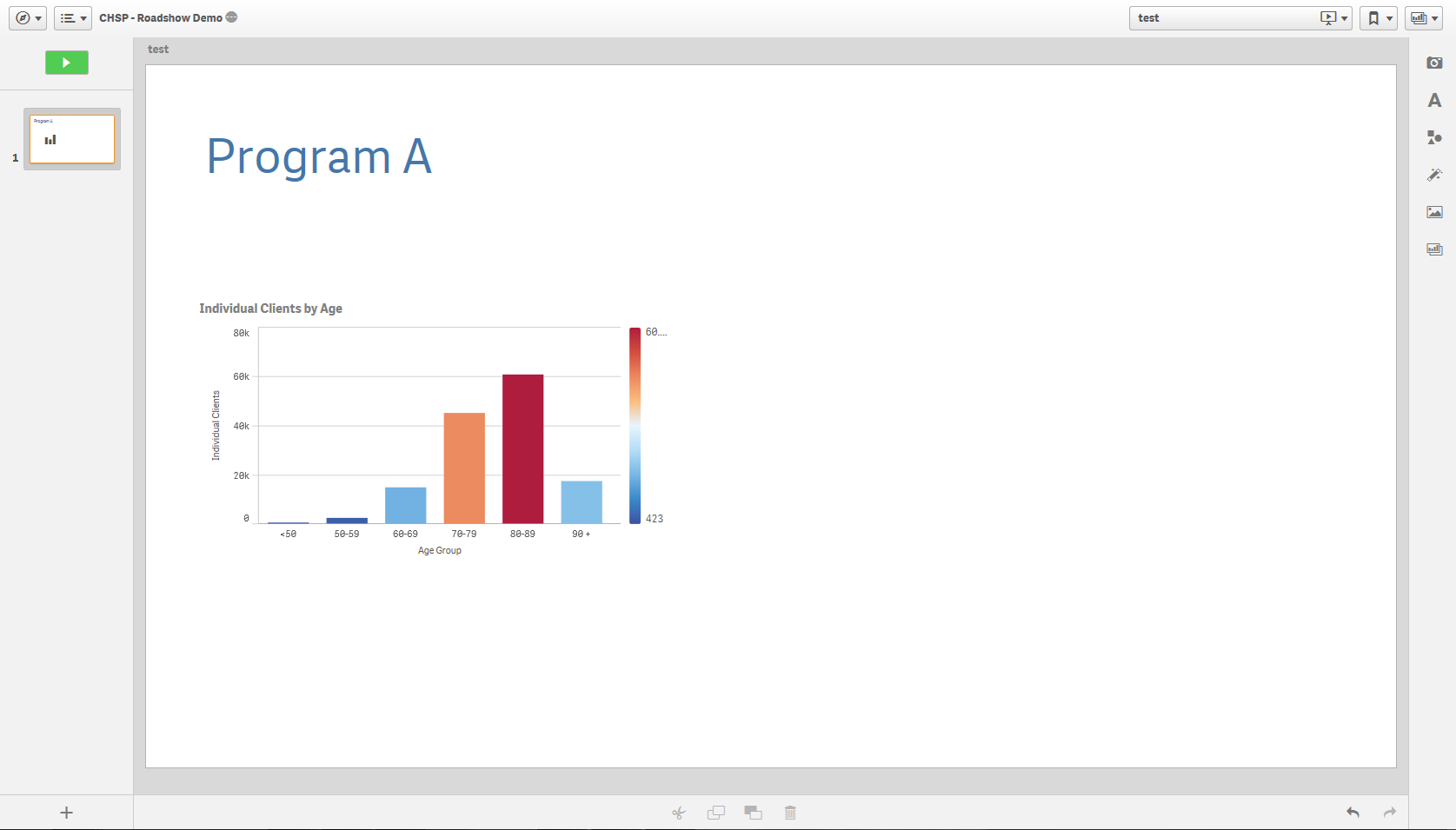
Choose the Story that interests you. **Figure 16** shows an example Story, ‘Clients for Program A’.

**Figure 16 – Stories drop down arrow and My stories tile**



The Story page will then display.

**Figure 17 – Story sheet with snapshot**



Select the This is a screen shot of the Animations icon. icon on the right of the Story page.

The **Effects library** pop up box will display.

**Figure 18 – Effects library pop up box**

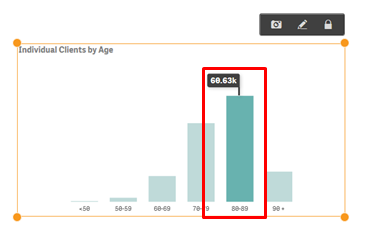


**Click** and **drag** the selected effect onto the snapshot.

The snapshot will display with the **effect** applied.

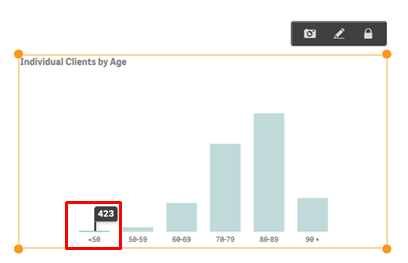
* **Highest value effect applied -** The column with the **highest value** will be highlighted and labelled. All other values will become dim.

**Figure 19 – Highest value effects applied to snapshot**



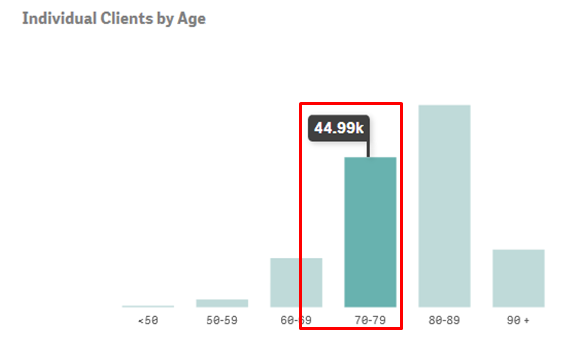
* **Lowest value effect applied -** The column with the **lowest value** will be highlighted and labelled. All other values will become dim.

**Figure 20 – Lowest value effects applied to snapshot**



* **Any value effect applied –** The selected column will be highlighted and labelled. All other values will become dim.

**Figure 21 – Any value effects applied to snapshot**

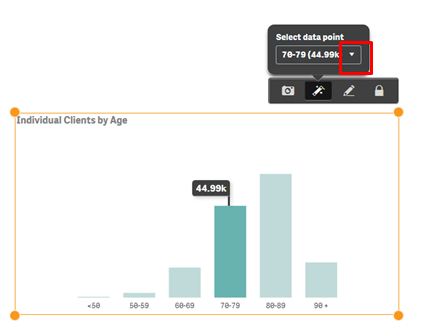


Click on the image to change the data item highlighted.

The **Select data point** pop up box will display.

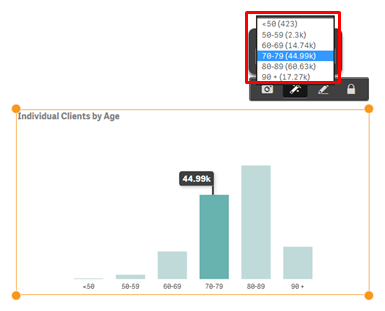
Select the drop down arrow in the **Select data point** pop up box to change the value selection.

**Figure 22 – Select data point pop up box**



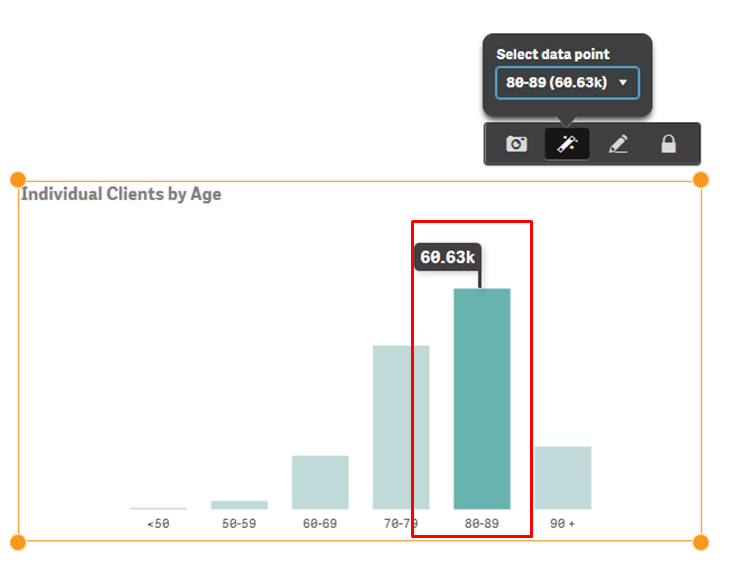
A **pop up** box will display with the items available in the image that can be selected.

**Figure 23 – Select data point pop up box**



Select the **required data point** item, and the item will automatically update.

**Figure 24 – Select data point pop up box**



1. Add snapshots to a story

You can add snapshots of graphs, pie charts, and line charts found in the reports, to your story.

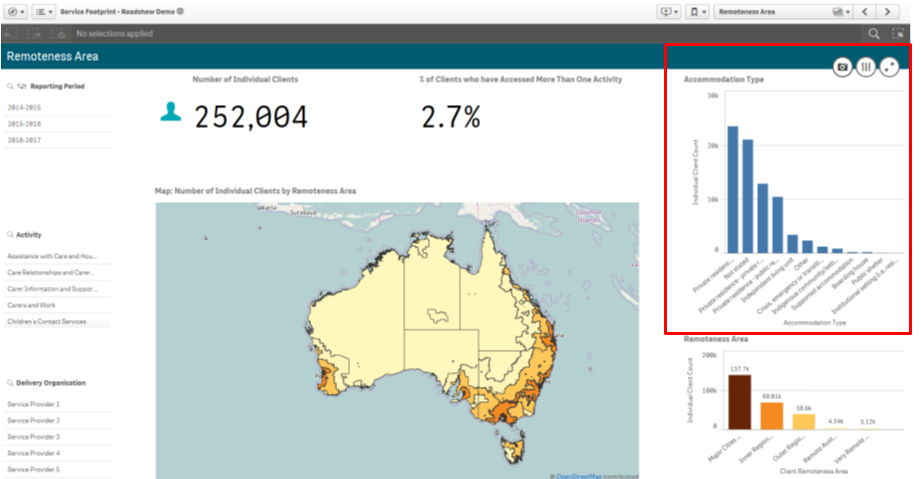
**Table 5 – Snapshot navigation items**

| **Item** | **Description** |
| --- | --- |
| This is a screen shot of the take snapshot button. | Select to **add** an image to the Snapshot library. |
| This is a screen shot of the story icon which you would select to start a story. | Select to **add** or **find** a story in the report. |
| This is a screen shot of the handles that can be used to resize and move the image anywhere on the page. | Select the **handles** on the corner of the image to resize the snapshot item. |
| Replace button | Select to **replace** the image with another snapshot item in your Stories library. |
| Edit button | Select to **edit** the image. |
| Lock button | Select **lock** to prevent any changes being made to the snapshot. |
| Go to source button | Select to **go to** the originating sheet source of the snapshot. |
| Return button | Select to **return** to the Story that you are creating. |
| Send to back button | Select to send the item to the back of the image layers. |
| Bring to front button | Select to send the item to the front of the image layers |
| Send backward button | Select to send the item back one layer of the image layers. |
| Bring forward button | Select to send the item front one layer of the image layers. |
| Go to source button | Select to return to the sheet the image was taken from. |
| Delete button | Select to remove the image from the story. |

* 1. Take a snapshot

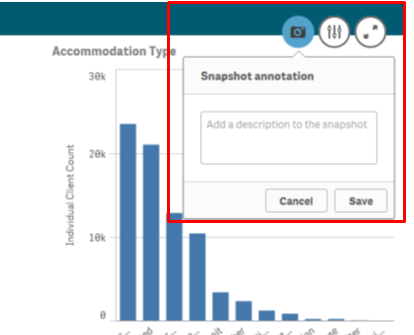
Access a report of interest, and select the item that you would like to add to the **Snapshot library**.

**Figure 25 - Item selection for Snapshot library**



Select This is a screen shot of the take snapshot button.and the **Snapshot annotation** pop up box will display.

**Figure 26 - Snapshot annotation pop up box**



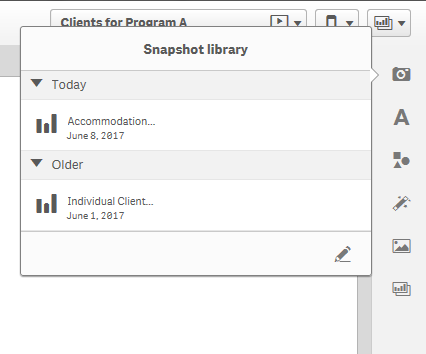
Enter a description of the snapshot and selectThis is a screen shot of the save button..

The item will display in the **Snapshot library**.

* 1. Add a snapshot to your story

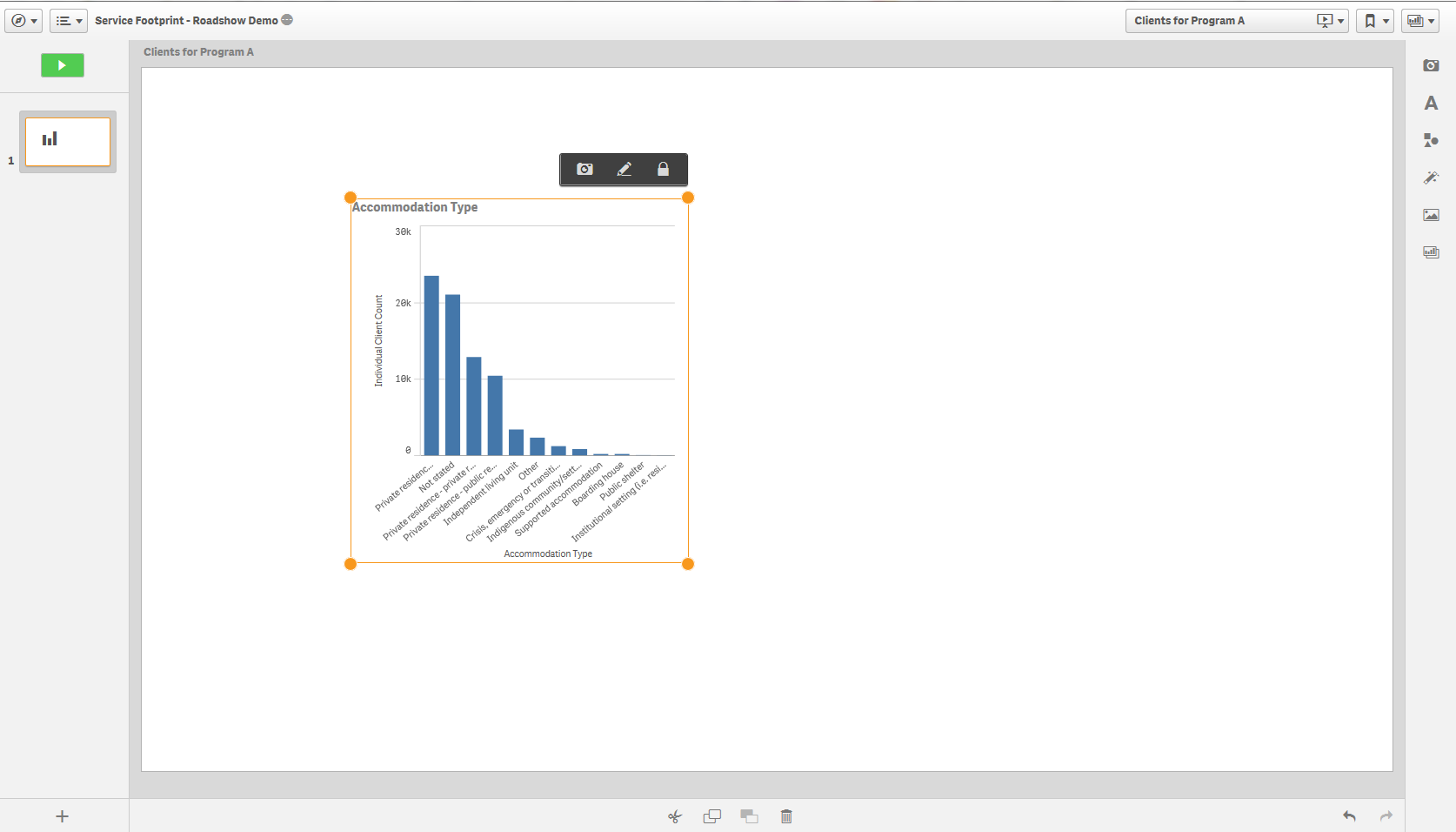
On the Story page (**Figure 3**), select This is a screen shot of the camera icon. and the **Snapshot library** pop up box will display with a listing of the snapshot items that have been saved for that report.

**Figure 27 - Snapshot library items**



**Click** and **drag** the selected item onto the story sheet.

**Figure 28 - Snapshot selection on the story sheet**



Use This is a screen shot of the handles that can be used to resize and move the image anywhere on the page. to resize or move the image anywhere on the page.

You can **click** and **drag** the snapshot wherever you want on the page.

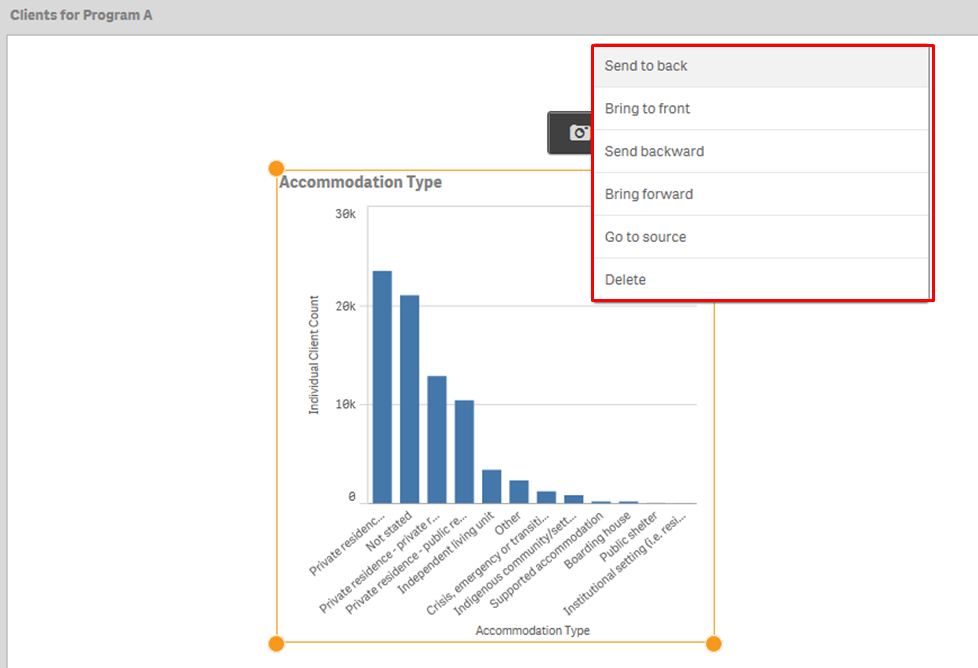
* 1. Arrange a snapshot

You can also:

* Change the position of the image
* remove the effect on the image
* delete the image, or
* return to the sheet where the image originated from.

If you **right click** on the snapshot image, an options pop up box will display.

**Figure 29 – Options pop up box**

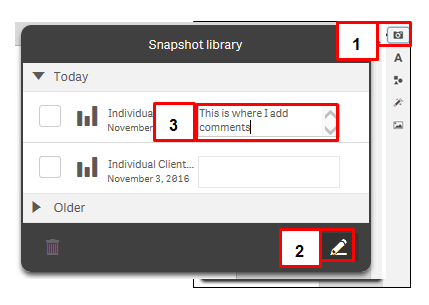


* 1. Add comments to a snapshot

You cannot change the title of a snapshot item. However, you can add comments to describe the snapshot item.

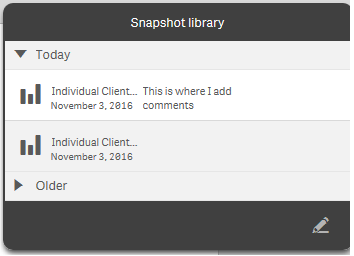
1. Select the **camera icon** to open the Snapshot library.
2. Select the **pencil icon** to open the comment fields.
3. Select the **snapshot item** and type the details in the comments field.

**Figure 30 – Snapshot library with comments field open**



The comments will automatically save.

**Figure 35 – Comments field for snapshot item updated**

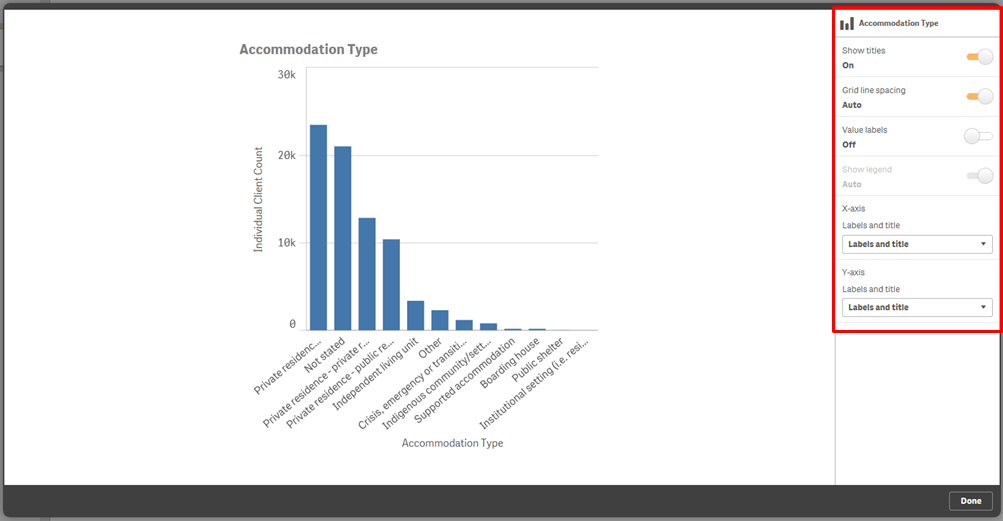


* 1. Edit a snapshot

Select Edit button to edit the snapshot.

An **edit** pop up box will display and you can amend titles, grid lines and labels.

**Figure 36 – Edit options for snapshot**



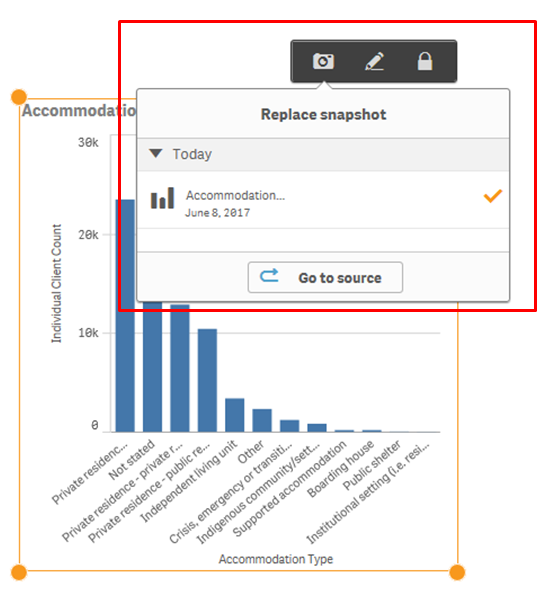
Select Done button to save the amendments.

* 1. Replace a snapshot

Select Replace snapshot button to replace the snapshot.

The **Replace snapshot** pop up box will display with the image that has been selected to be replaced.

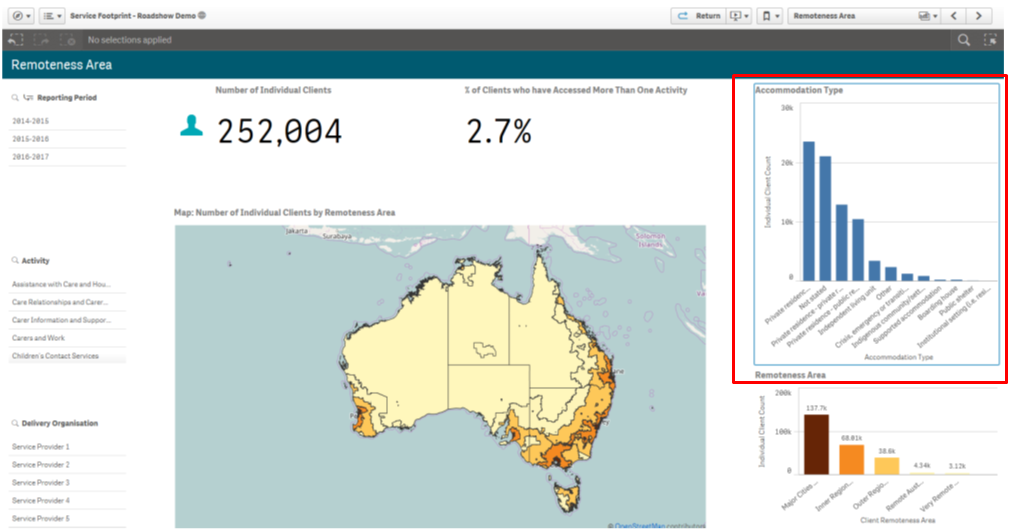
**Figure 37 – Replace snapshot pop up box**



Select Go to source button to choose another snapshot from the originating sheet source.

The **originating sheet** will display with a line around the original snapshot.

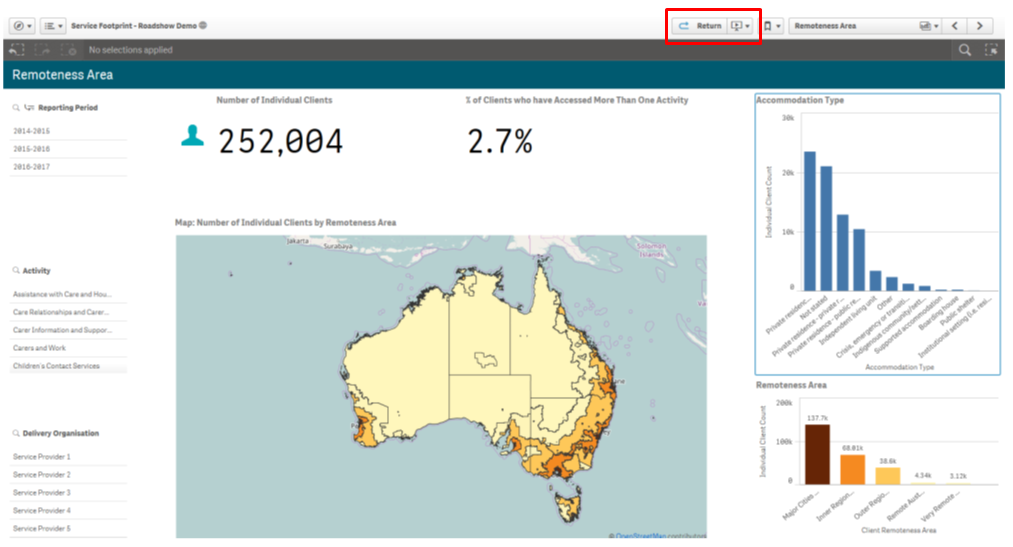
**Figure 38 – Originating sheet for snapshot**



Select a different item to add to the **Snapshot library**.

Select Return button to return to the story you are creating.

**Figure 39 – Return to Story button**



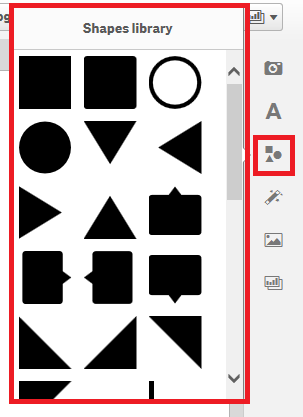
Select This is a screen shot of the camera icon. to open the **Snapshot library** and select your new snapshot item to your story.

1. Add shapes to the story

You can add shapes to the story by using the **Shapes library**. You can add **shapes** to the story page by selecting This is a screen shot of the shapes library icon. within the functions bar found on the right-hand side of the story page.

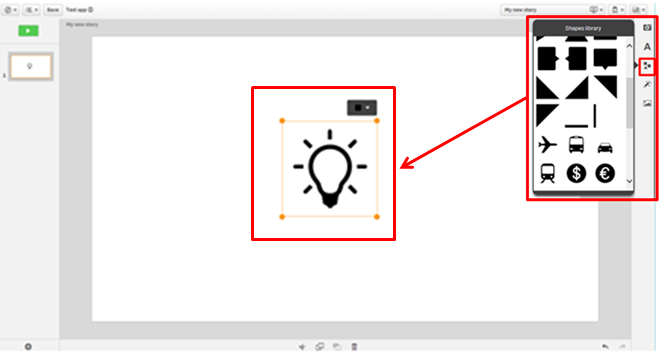
The **Shapes library** pop up box will display.

Figure 42- Shapes library pop up box



**Click and drag**,or **double click** on the desired shape, to add it to the Story page.

Figure 4 – Add shapes to the story pop up box

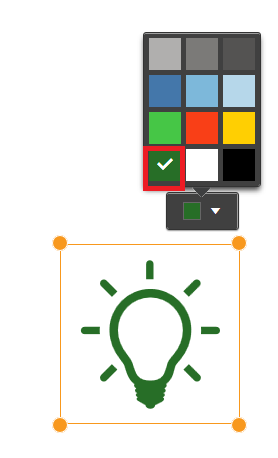


Use the This is a screen shot of the handles that can be used to resize and move the image anywhere on the page. to resize or move the shape anywhere on the page.

Select This is a screen shot of the Colour menu drop down arrow. to edit the colour of the shape.

The **✓** icon confirms your colour selection.

Figure 43 – Edit the shape colour menu



1. Preview the story

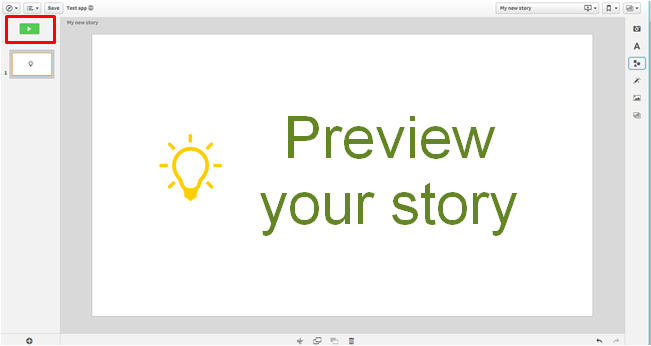
You can preview your Story before exporting it.

**Table 1 – Preview story navigation items**

| **ITEM** | **DESCRIPTION** |
| --- | --- |
| This is a screen shot of the close button to exit out of the preview of the story. | Select the **Close** button to close the preview. |
| This is a screen shot of the action icon. | Select the **Actions** button for options to move back and forward and export. |
| Back button | Select the **Back** button to go to the previous slide in the story. |
| Forward button | Select the **Forward** button to go to the next slide in the story. |
| Export to PDF or PowerPoint button | Select the **Export** button to export the story to PDF or PowerPoint. |
| Play button | Select the **Play** button to play the story. |

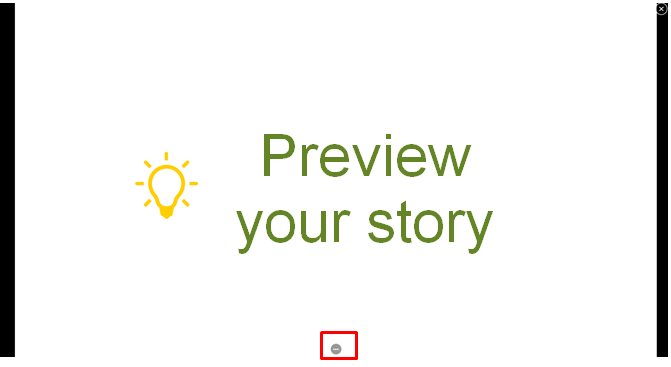
To preview your story, choose the Story you are working on. On the Story page, select Play buttonon the top left of the screen.

**Figure 45 – Play your story button**



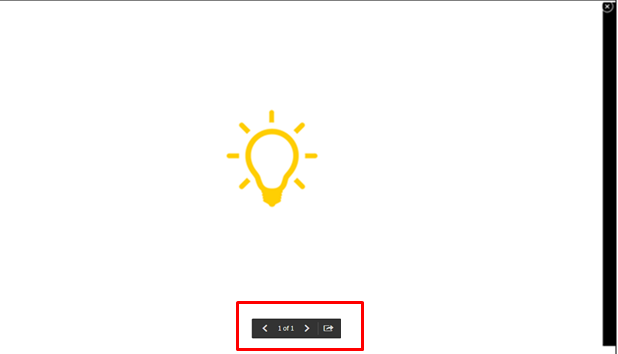
The Story will display in preview mode.

**Figure 46 – Play your story screen**



If you select This is a screen shot of the action icon. at the bottom of the screen, the **sheet navigation** buttons will display.

**Figure 47 – Play your story sheet navigation buttons**



These buttons will allow you to move **back** and **forward** through the preview.

Select This is a screen shot of the export button. to export the story to PowerPoint or PDF.

Select This is a screen shot of the close button to exit out of the preview of the story. to exit the preview.

1. Export the story

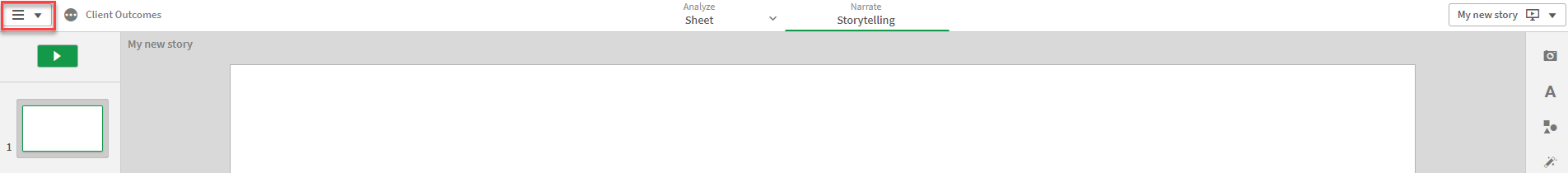
If you want to print, or play the story outside of the Data Exchange Application, you will need to export the Story **beforehand**.

**Table 1 –Export options navigation items**

| **Item** | **Description** |
| --- | --- |
| Export story to PowerPoint button | Select the **Export story to PowerPoint** icon to send the story to PowerPoint. |
| Export story to PDF button | Select the **Export story to PDF** icon to send the story to PDF. |
| Duplicate story button | Select the **Duplicate story** icon to make a copy of the original story. |
| Delete story button | Select the **Delete story** icon to remove the story. |
| Help button | Select the **Help** icon to get online help from Sense website with the item that you are viewing. |
| About and information button for Qlik | Select the **About** icon to get information about the application. |
| This is a screen shot of the menu icon. | Select the **Menu** icon to export the story. |

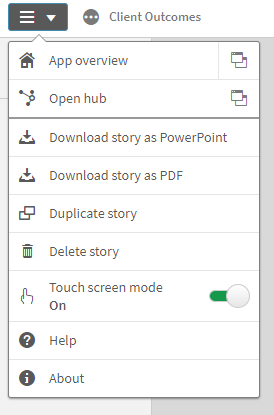
On the Story page, select This is a screen shot of the menu icon. at the top left of screen to export the story to PDF or PowerPoint.

**Figure 50 – Menu icon selection to export story**



The **Export Story** pop up box will display.

**Figure 51 – Export story pop up box**

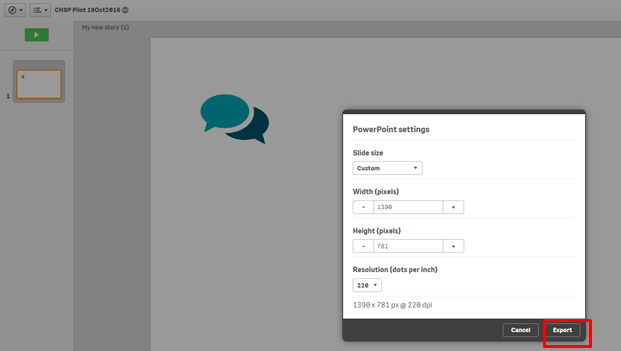


You can export your story as a PowerPoint or PDF.

* 1. Export story to PowerPoint

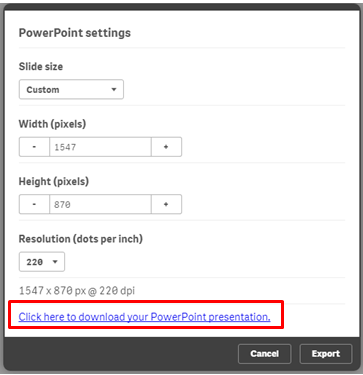
Make the appropriate changes to the **PowerPoint settings** then selectThis is a screen shot of the export button to export the story to PowerPoint.**.**

**Figure 52 – PowerPoint settings pop up box**



Select the **PowerPoint hyperlink** that displays.

**Figure 53 – Click to download PowerPoint hyperlink**



Select the options for the download.

If required, select This is a screen shot of the cancel button to stop the download process. to stop the download

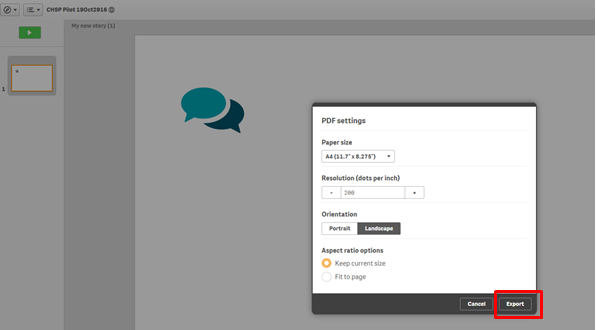
**Figure 54 – PowerPoint download options**

This is a screen shot of the Download options

* 1. Export story to PDF

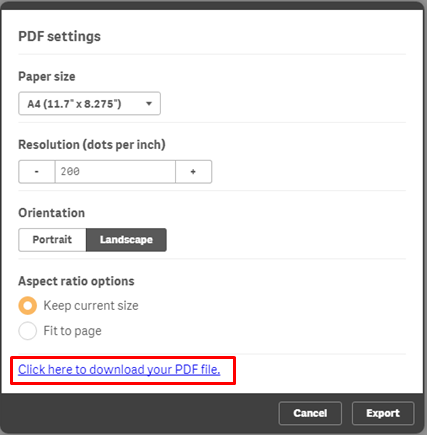
Make the appropriate changes to the **PDF settings** then selectThis is a screen shot of the export button to export the story to PowerPoint.**.**

**Figure 55 – PDF settings pop up box**



Select the **PDF hyperlink** that displays.

**Figure 56– Click to download PDF hyperlink**



Select the options for the download.

If required, select This is a screen shot of the cancel button to stop the download process.to stop the download.

**Figure 57 – PDF download options**

This is a screen shot of the PDF download options

You can find more information on reporting requirements in the [Data Exchange Protocols](https://dex.dss.gov.au/document/81). For further information on reports functionality, please visit the [Training](https://dex.dss.gov.au/training) tab of the Data Exchange website.

For system support, contact the Data Exchange Helpdesk by email at [dssdataexchange.helpdesk@dss.gov.au](mailto:dssdataexchange.helpdesk@dss.gov.au) or on 1800 020 283.