



Data Exchange Reports - Story

Task card

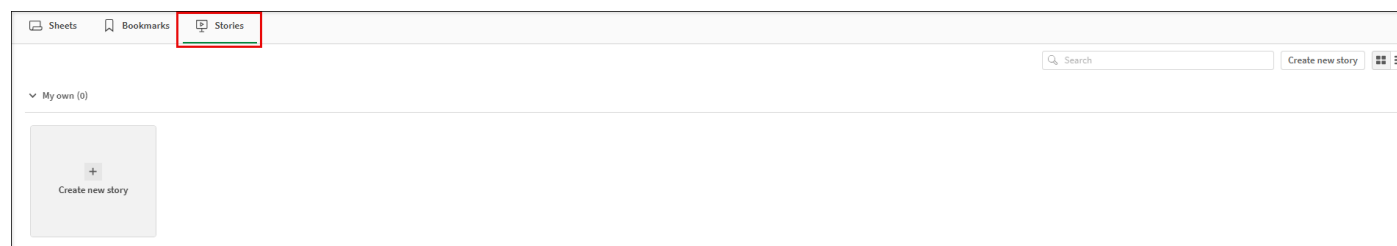
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What is a story?

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.

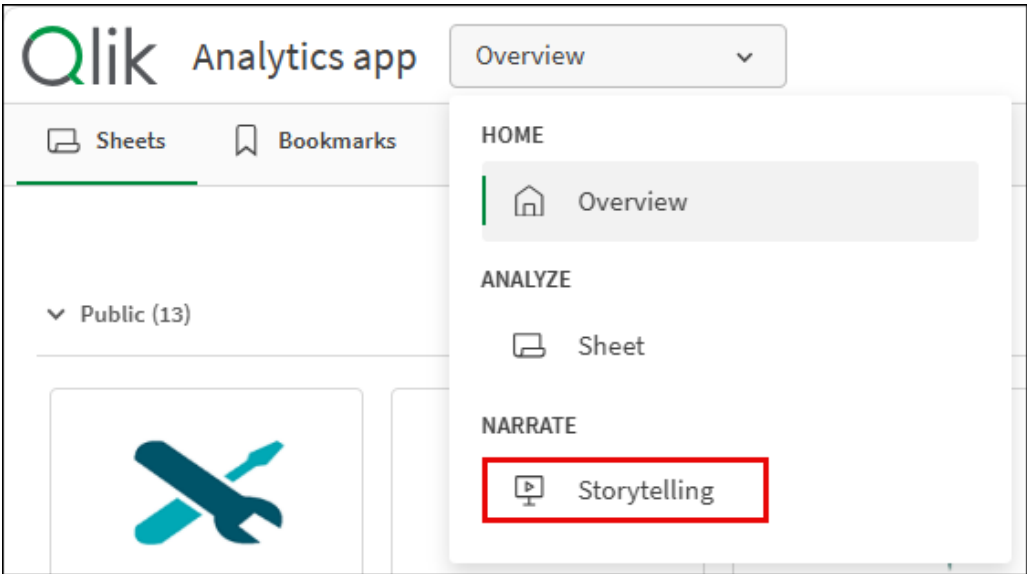
To start, choose a report that interests you. On the report page, you can access your stories by clicking on the **Stories** tab of the report, as per **Figure 1** below.

Figure 1 – Stories tab



You can also access the Stories from the drop-down box at Figure 2 from other selected sheets. (insert new figure screenshot)

Figure 2 – Stories drop-down box



You can find more information on how to use Data Exchange reports at the [Tutorials](#) page on the [Qlik website](#).

Add items to a Story

Table 1 – Add a new My story navigation icons

ITEM	DESCRIPTION
	Select the Play button to play your story.
	Select the Camera icon to select an image from your snapshots to insert into your story.
	Select the Add text icon to insert text into your story.
	Select the Shapes icon to select different shapes to insert into your story.
	Select the Animation icon to animate your shape or image in your story.
	Select the Media icon to select media objects to insert into your story.
	Select the Add slide button to add a new slide to your story.
	Select the Cut icon to remove an item from your story slide.
	Select the Copy icon to copy an item from your story slide.
	Select the Paste icon to paste an item onto your story slide.
	Select the Delete icon to delete an item from your story slide.

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

Figure 3 – Stories pop tab



The **Story** page will display.

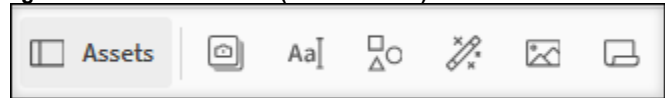
Figure 4 – Story page



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 5 – Add items icons (Refer Table 1)



Add a sheet (page) to the story

Table 2 – Add a page navigation items

ITEM	DESCRIPTION
	Select the sheet icon to insert a new sheet into the story.
	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 right-aligned icon to insert the image on the right-hand side and add text on the left-hand side.



Select the **Add new slide** 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.

Method 1 – Insert a blank sheet to a story

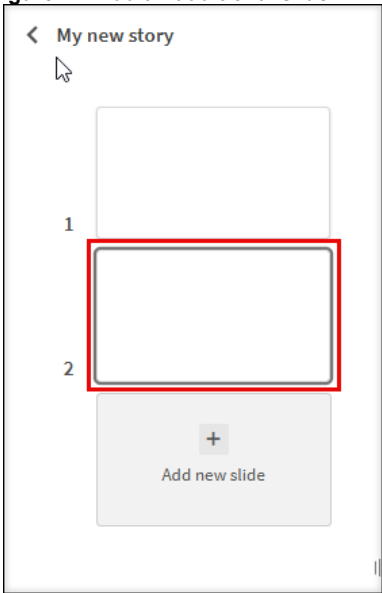
Select the **Add new slide** icon  on the bottom left of the story page.

Figure 6 – Add a blank sheet to the story icon



The additional slide will display in the side panel.

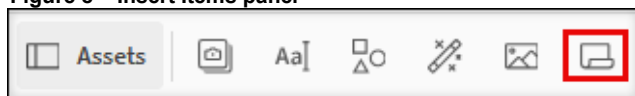
Figure 7 – Add an additional slide



Method 2 - Insert a live data Base sheet from a report

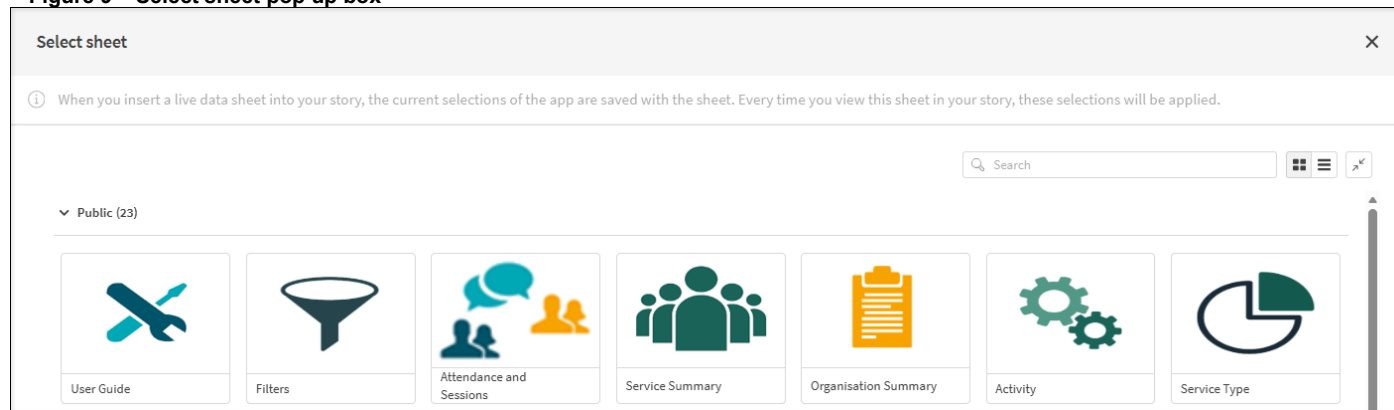
Select the **Sheet icon**  from the functions bar found on the right-hand side of the Story page.

Figure 8 – Insert Items panel



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

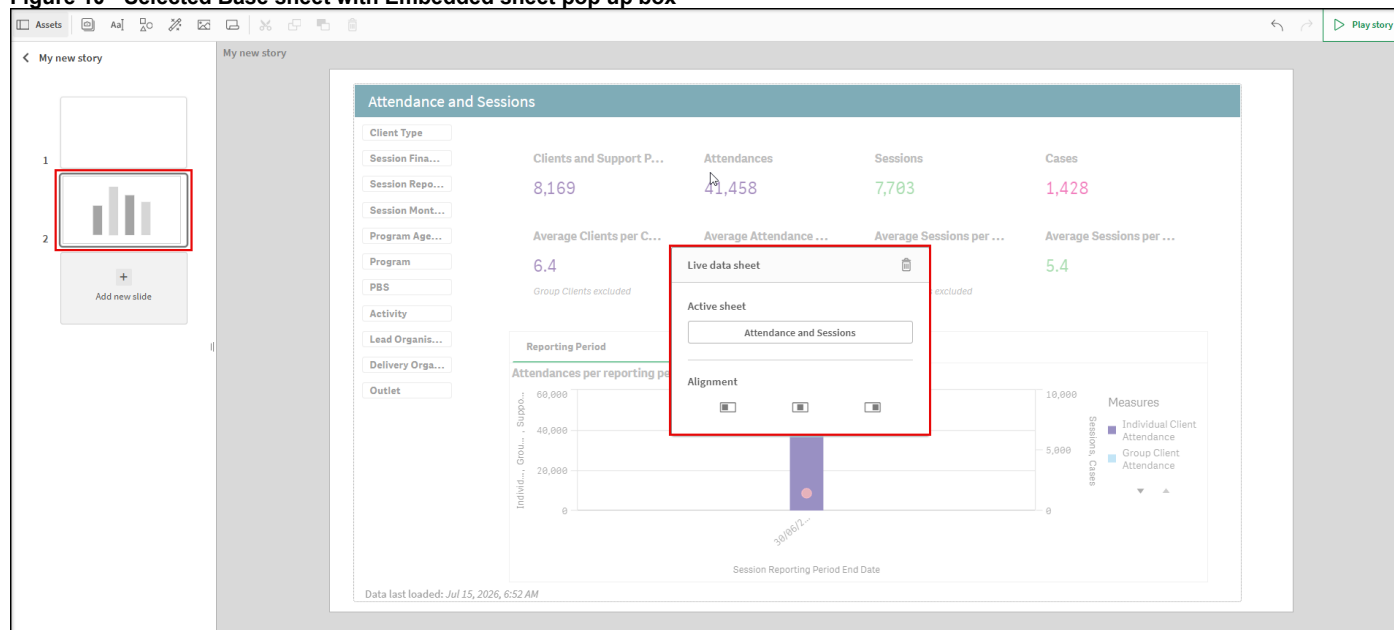
Figure 9 – Select sheet pop up box



Select the required **Base** sheet.

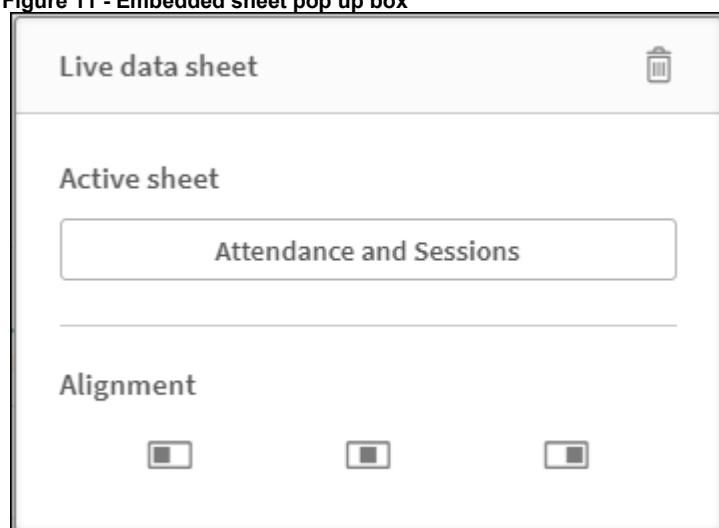
The selected sheet will be inserted into the Story and the **Live Data sheet** pop up box will display.

Figure 10 - Selected Base sheet with Embedded sheet pop up box



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

Figure 11 - 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.

Add text to the story

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

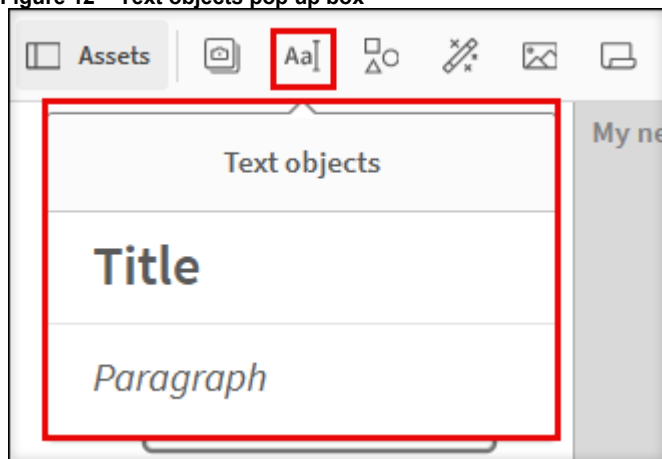
Table 3 – Title and Paragraph boxes navigation items

Item	Description
	Select the edit icon to display the different edit options available.
	Within the Title box, select the drop-down arrow near the colour box to choose the font colour.
	Select B , I or U to make the text bold, italic or underlined.
	Select the hyperlink icon to link a URL to the text.
	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 box. You can also select the alignment options to change the alignment of the text.
	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 text to the story page by selecting 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.

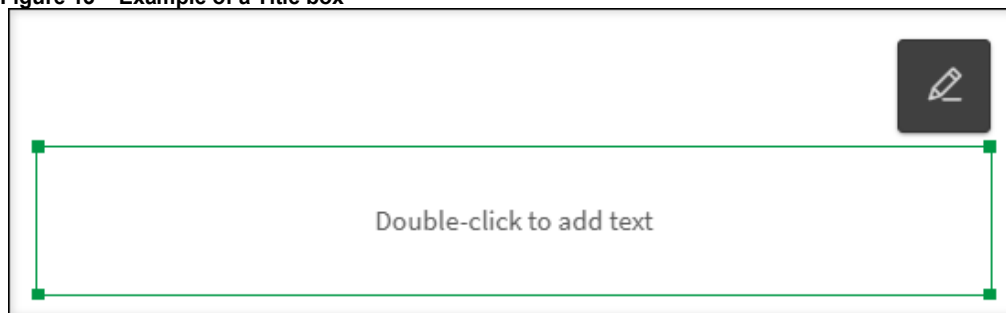
Figure 12 – Text objects pop up box



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

Example of Title box:

Figure 13 – Example of a Title box



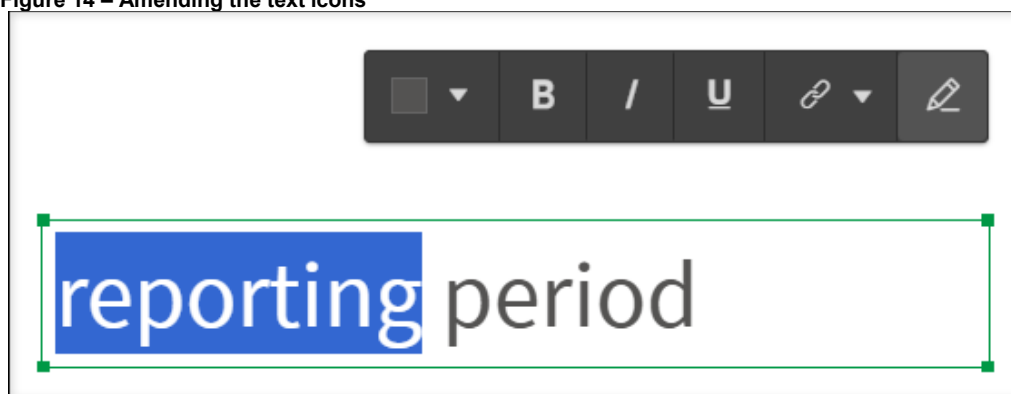
Select the **Edit** icon  to display the **Edit** options.

Use the **handles**  to resize or move the image anywhere on the page.

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

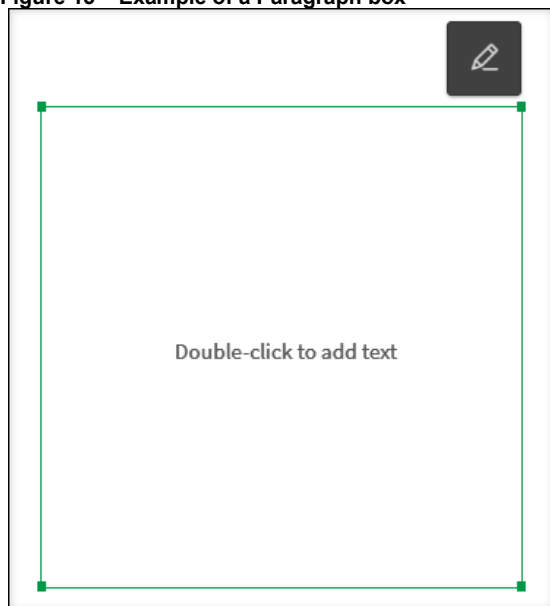
Highlight the required text to amend the font size, style, colour or to add a hyperlink.

Figure 14 – Amending the text icons



Example of Paragraph box:

Figure 15 – Example of a Paragraph box



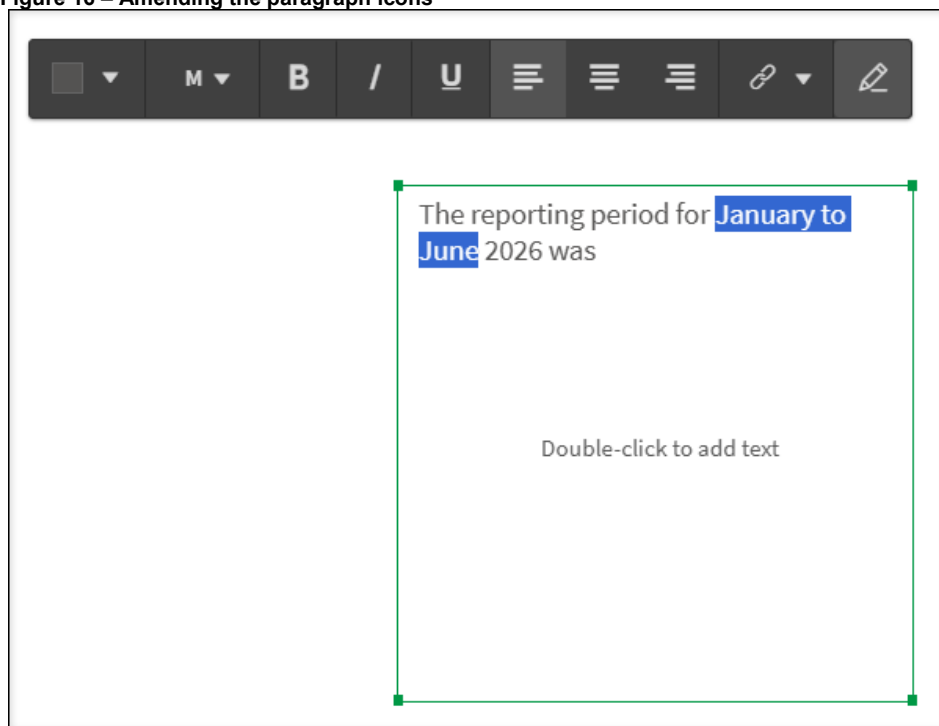
Select the **Edit** icon  to display the **Edit** options.

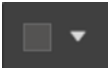
Use the **handles**  to resize or move the image anywhere on the page.

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 16 – Amending the paragraph icons



Select the **drop-down arrow**  to choose the font colour.

Add animations to a story

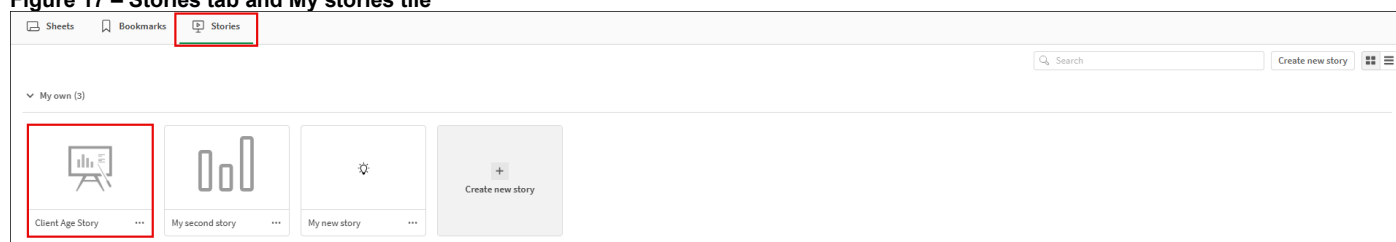
You are able to add animations to your story by using the **Effects library**. These visual effects can only be used on bar charts, line charts and pie charts.

Table 4 – Effects library navigation items

Item	Description
	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
	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.
	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.
	Select to replace the image with another snapshot item in your Stories library.
	Select to edit the image.
	Select lock to prevent any changes being made to the snapshot.
	Select to go to the originating sheet source of the snapshot.

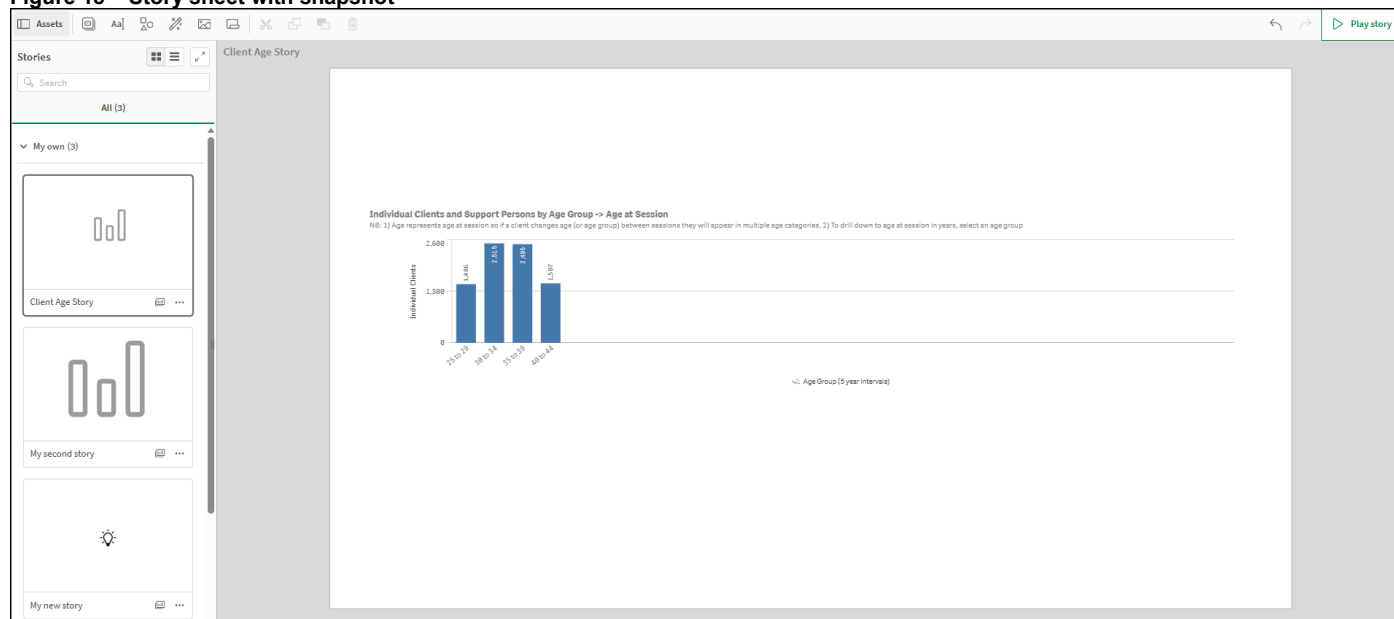
Choose the Story that interests you. **Figure 16** shows an example Story, 'Clients for Program A'.

Figure 17 – Stories tab and My stories tile



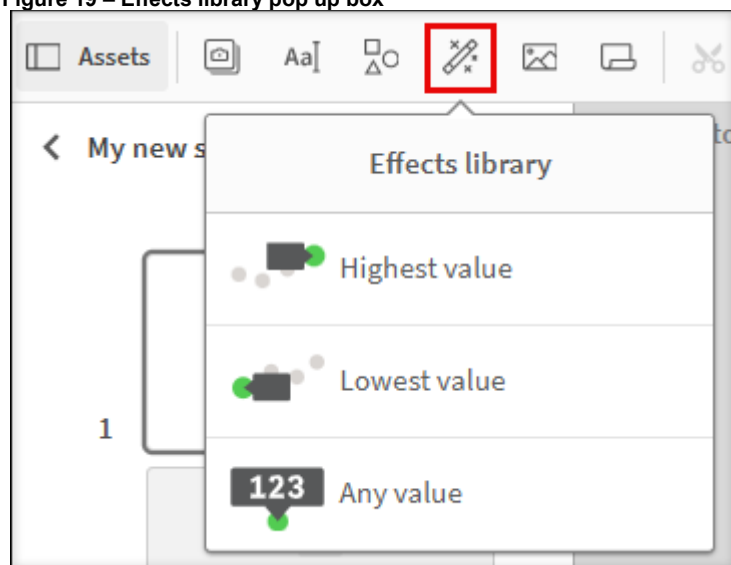
The Story page will then display.

Figure 18 – Story sheet with snapshot



Select the **Animation** icon  on the right of the Story page.
The **Effects library** pop up box will display.

Figure 19 – Effects library pop up box

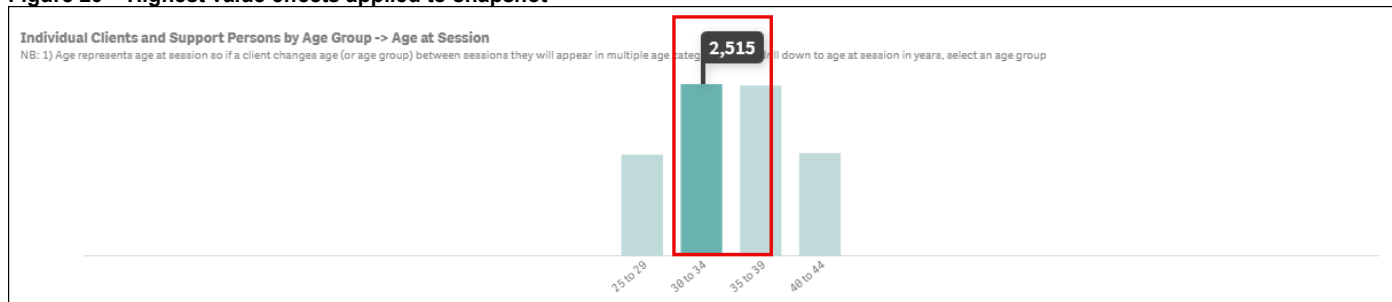


Click and drag the selected effect onto the snapshot.

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

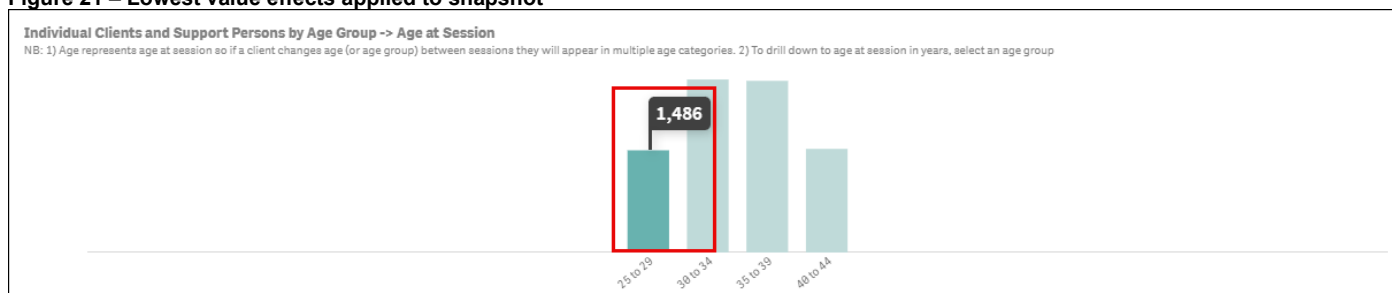
- **Highest value effect applied** - The column with the **highest value** will be highlighted and labelled. All other values will become dim.

Figure 20 – Highest value effects applied to snapshot



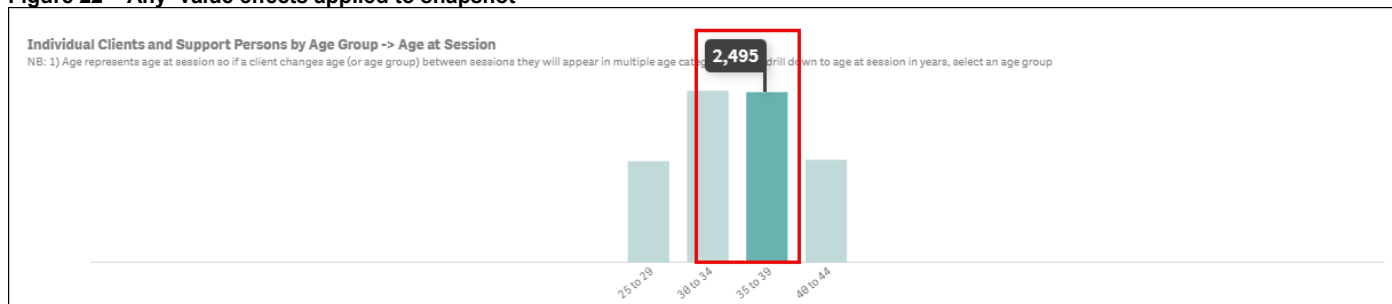
- **Lowest value effect applied** - The column with the **lowest value** will be highlighted and labelled. All other values will become dim.

Figure 21 – 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 22 – Any value effects applied to snapshot

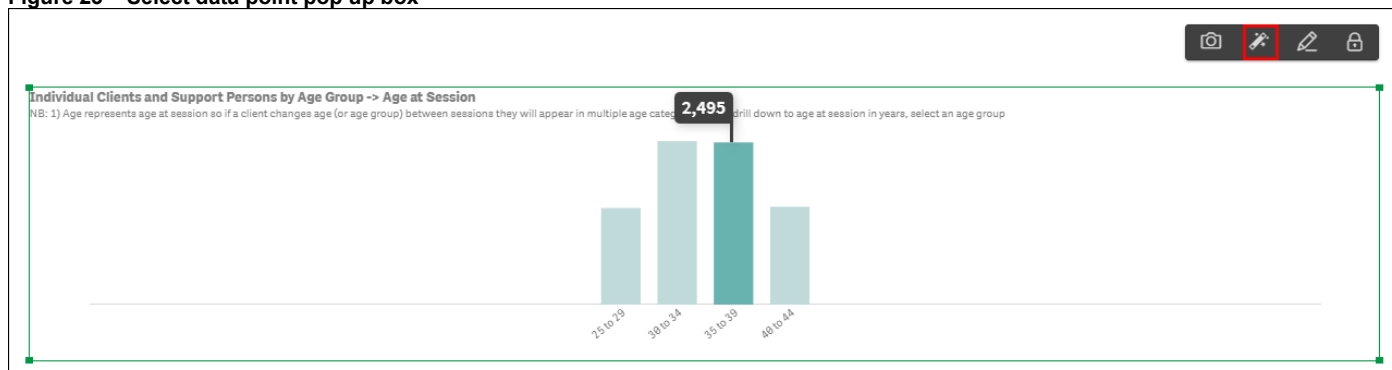


Click on the image to change the data item highlighted.

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

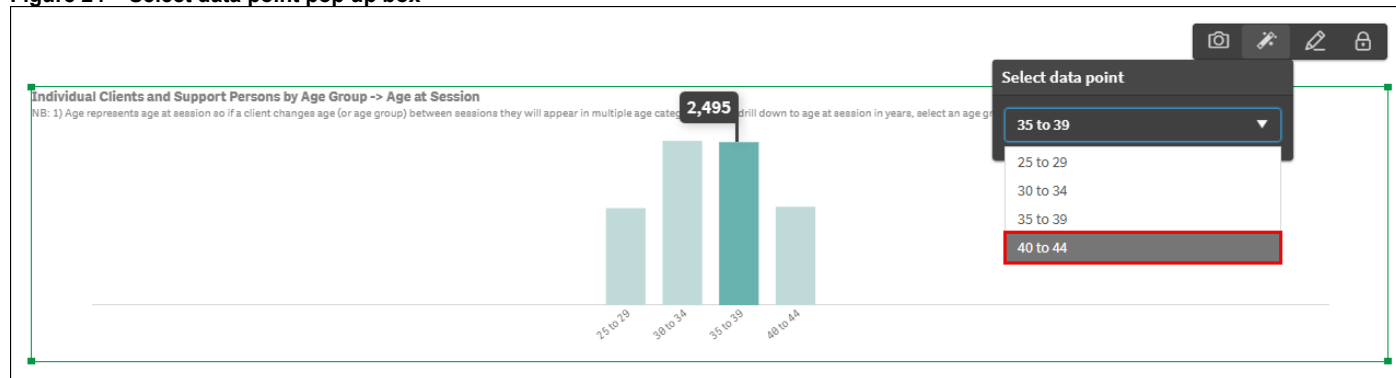
Select the drop-down arrow in the **Select data point** pop up box to change the value selection.

Figure 23 – Select data point pop up box



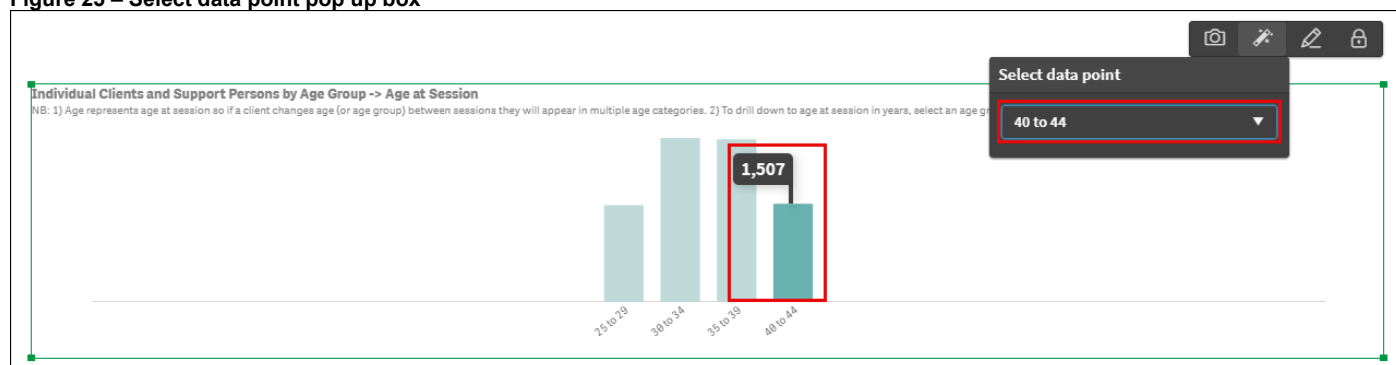
A **pop-up** box will display with the items available in the image that can be selected.

Figure 24 – Select data point pop up box



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

Figure 25 – Select data point pop up box



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

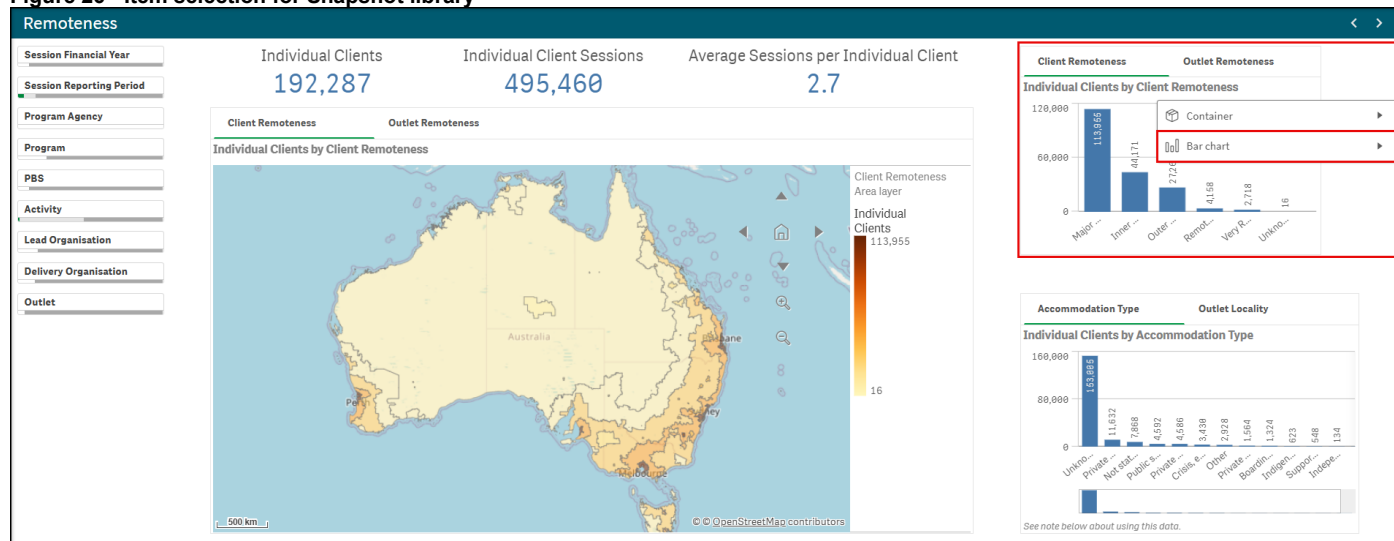
Item	Description
	Select to add an image to the Snapshot library.
	Select to add or find a story in the report.
	Select the handles on the corner of the image to resize the snapshot item.
	Select to replace the image with another snapshot item in your Stories library.
	Select to edit the image.
	Select lock to prevent any changes being made to the snapshot.
 Go to source	Select to go to the originating sheet source of the snapshot.
Send to back	Select to send the item to the back of the image layers.
Bring to front	Select to send the item to the front of the image layers
Send backward	Select to send the item back one layer of the image layers.
Bring forward	Select to send the item front one layer of the image layers.
Go to source	Select to return to the sheet the image was taken from.
Delete	Select to remove the image from the story.

Take a snapshot

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

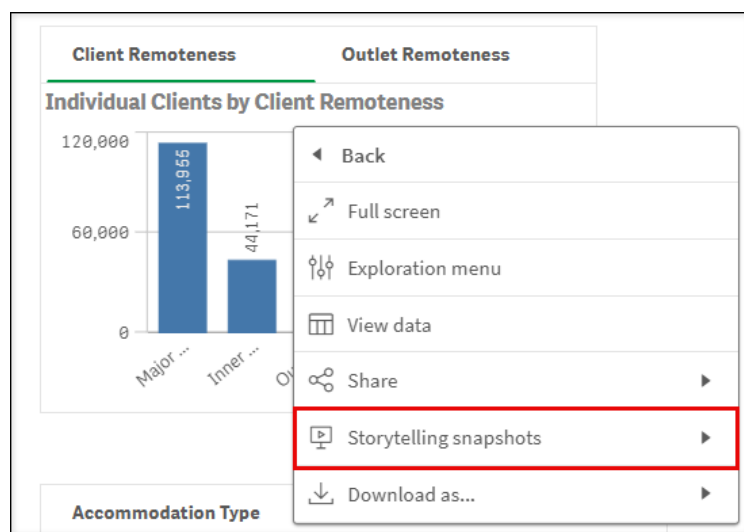
Select **Bar chart**.

Figure 26 - Item selection for Snapshot library



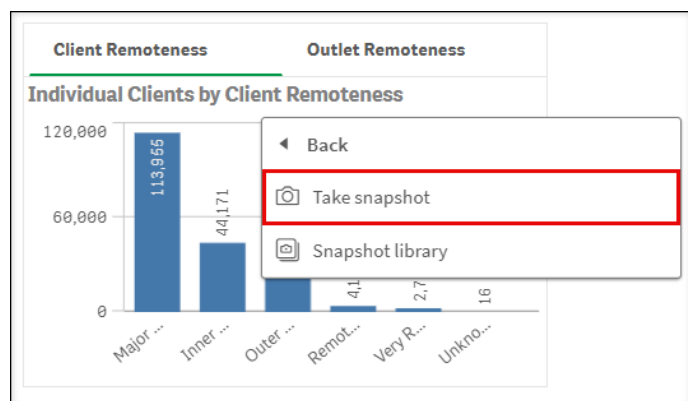
Select **Storytelling snapshots** from the pop-up box.

Figure 27 - Item selection for Snapshot library



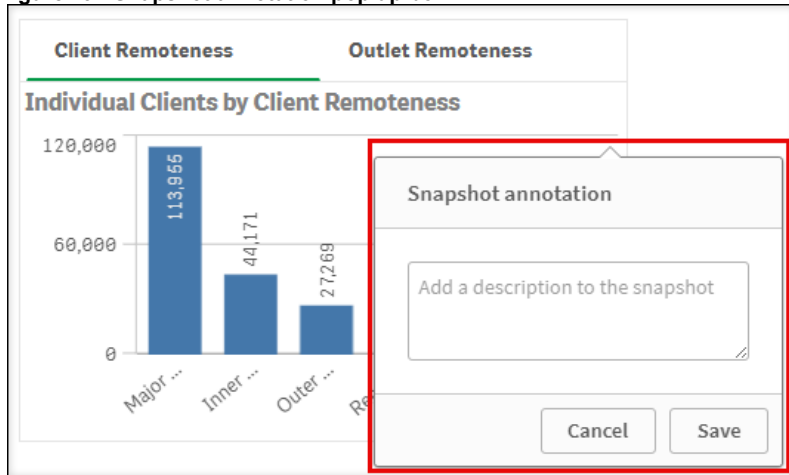
Next, select **Take snapshot** from the pop-up box.

Figure 28 - Item selection for Snapshot library



You can add a description in the **Snapshot annotation** pop up box.

Figure 29 - Snapshot annotation pop up box

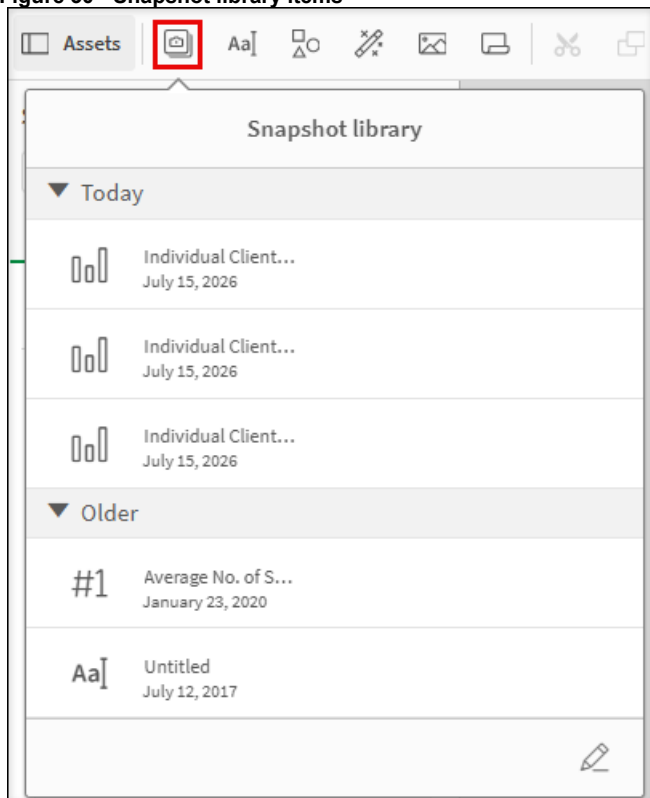


Enter a description of the snapshot and select **Save**. The item will display in the **Snapshot library**.

Add a snapshot to your story

On the Story page (**Figure 4**), select 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 30 - Snapshot library items



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

Figure 31 - Snapshot selection on the story sheet



Use the **handles**  to resize or move the image anywhere on the page.

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

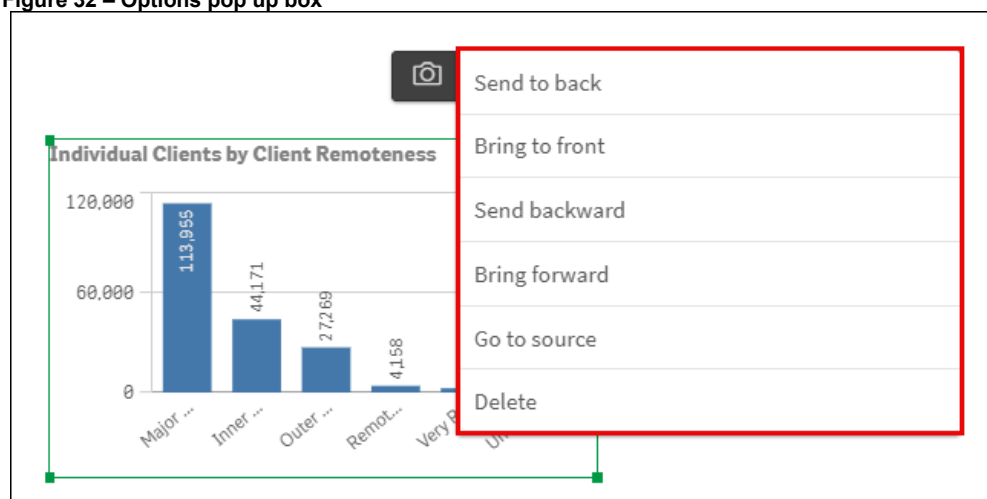
Arrange a snapshot

You can also:

- Change the position of 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 32 – Options pop up box

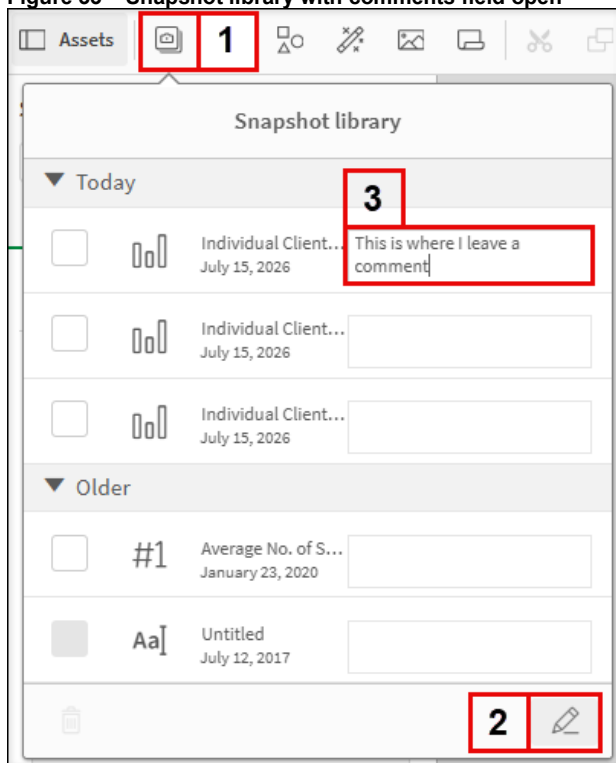


Add comments to a snapshot

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

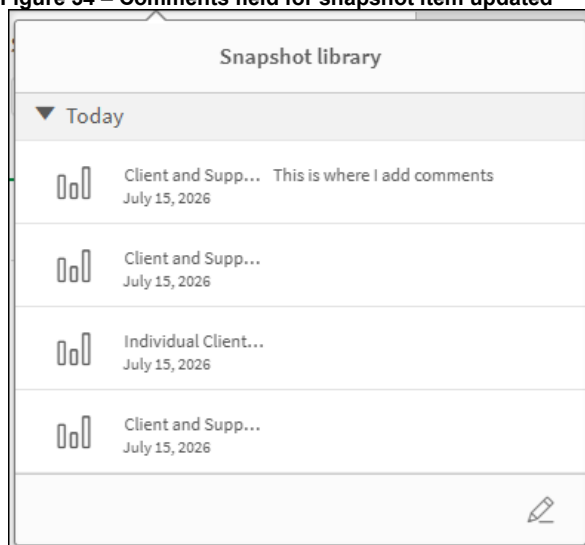
1. Select the **camera icon** to open the Snapshot library.
2. Select the **pencil icon** to open the comment fields.
3. Select the **snapshot item** and type the details in the comments field.

Figure 33 – Snapshot library with comments field open



The comments will automatically save.

Figure 34 – Comments field for snapshot item updated

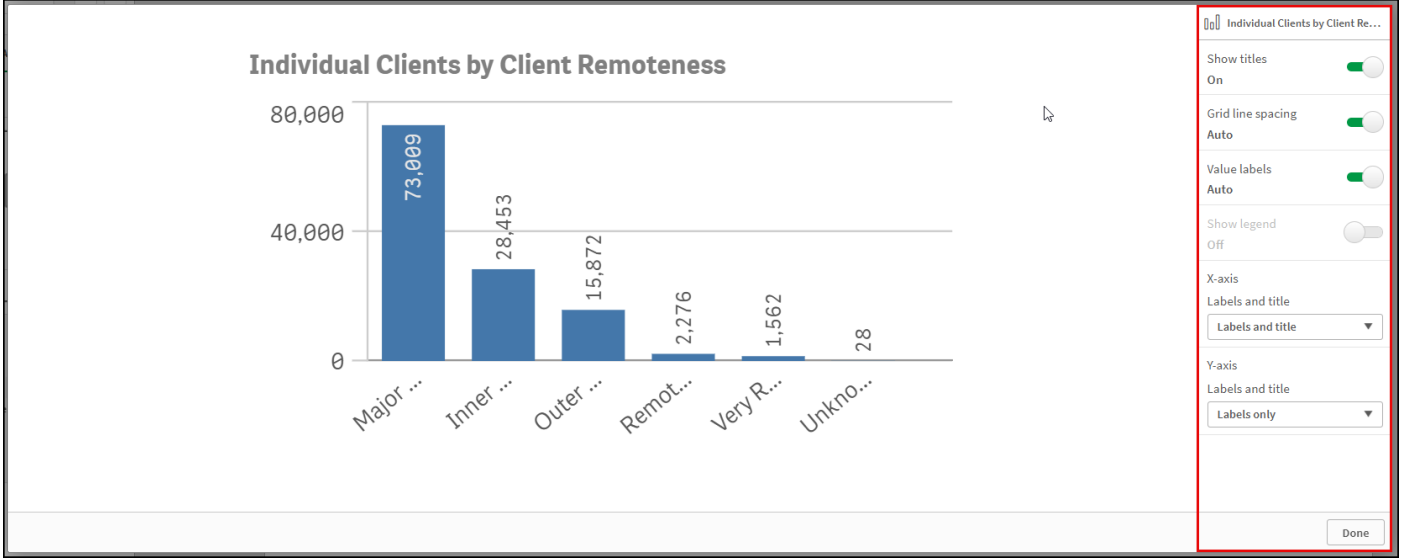


Edit a snapshot

Select **Edit**  to edit the snapshot.

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

Figure 35 – Edit options for snapshot

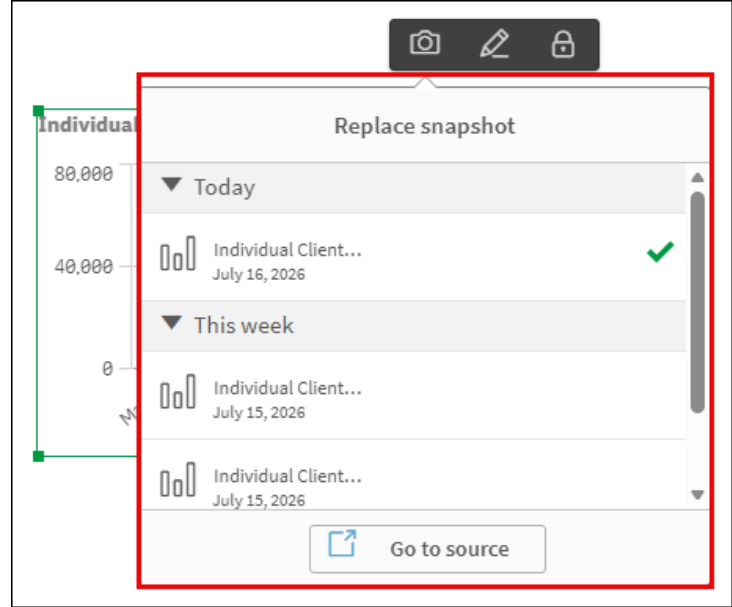


Select **Done**  to save the amendments.

Replace a snapshot

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

Figure 36 – Replace snapshot pop-up box



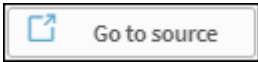
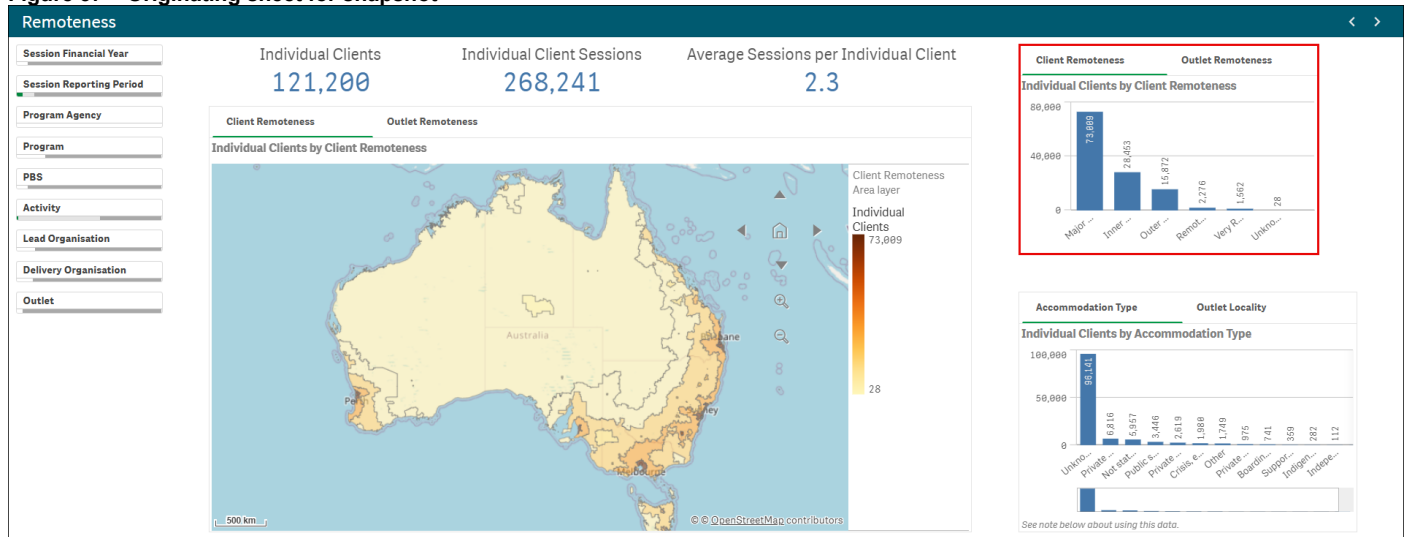
Select **Go to source**  to choose another snapshot from the originating sheet source.
The **originating sheet** will display with a line around the original snapshot.

Figure 37 – Originating sheet for snapshot



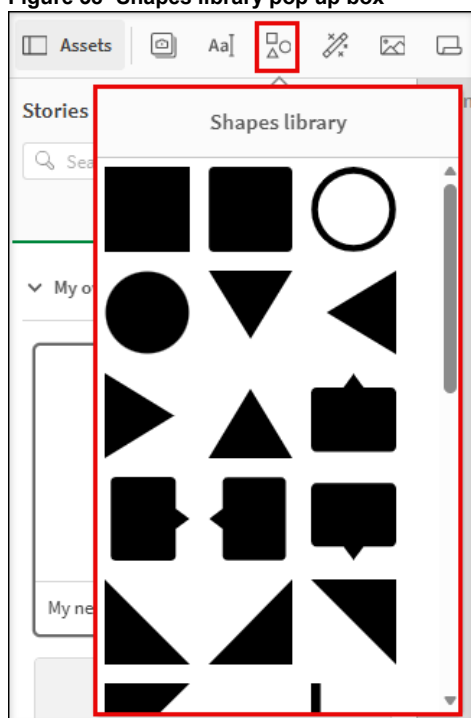
Select a different item to add to the **Snapshot library**.

Add shapes to the story

You can add **shapes** to the story page by selecting the **Shapes** icon  within the functions bar found on the right-hand side of the story page.

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

Figure 38- Shapes library pop up box



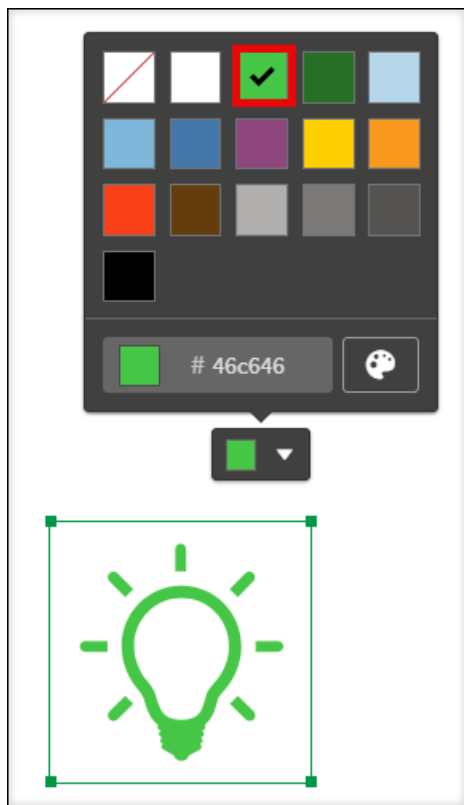
Click and drag, or **double click** on the desired shape, to add it to the Story page.

Use the **handles**  to resize or move the shape anywhere on the page.

Select the **drop-down arrow**  to edit the colour of the shape.

The ✓ icon confirms your colour selection.

Figure 39 – Edit the shape colour menu



Preview the story

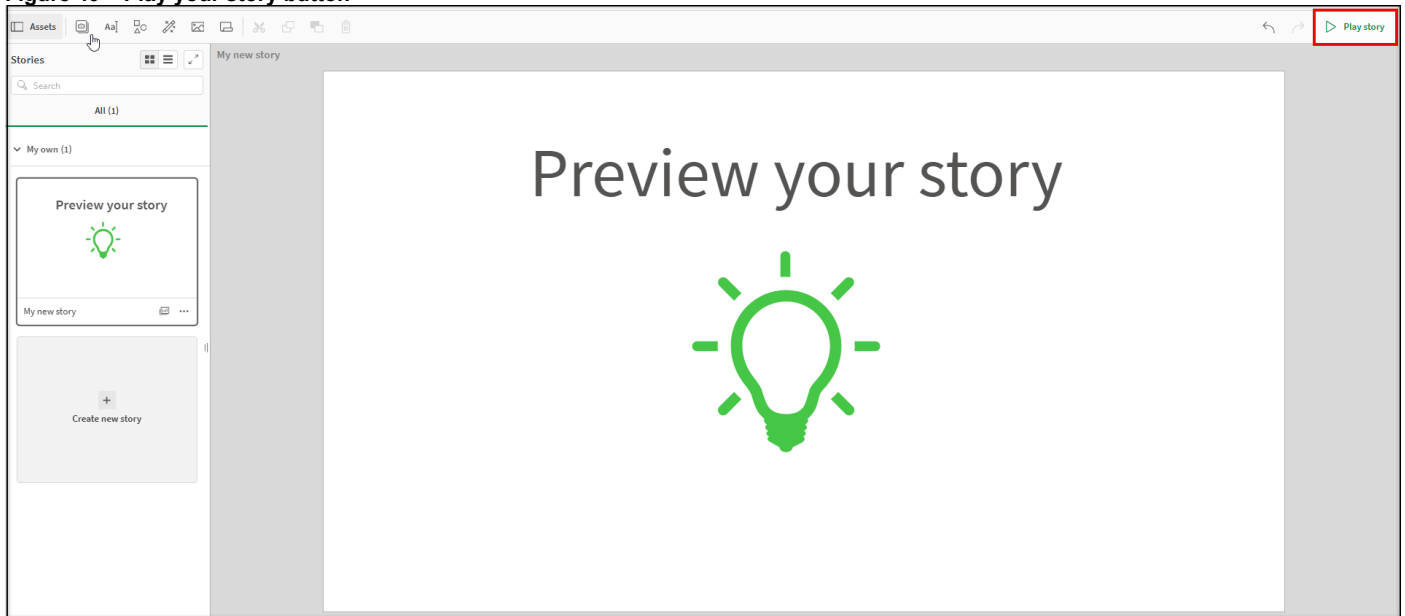
You can preview your Story before exporting it.

Table 1 – Preview story navigation items

ITEM	DESCRIPTION
	Select the Close button to close the preview.
	Select the Actions button for options to move back and forward and export.
	Select the Back button to go to the previous slide in the story.
	Select the Forward button to go to the next slide in the story.
	Select the Export button to export the story to PDF or PowerPoint.
	Select the Play button to play the story.

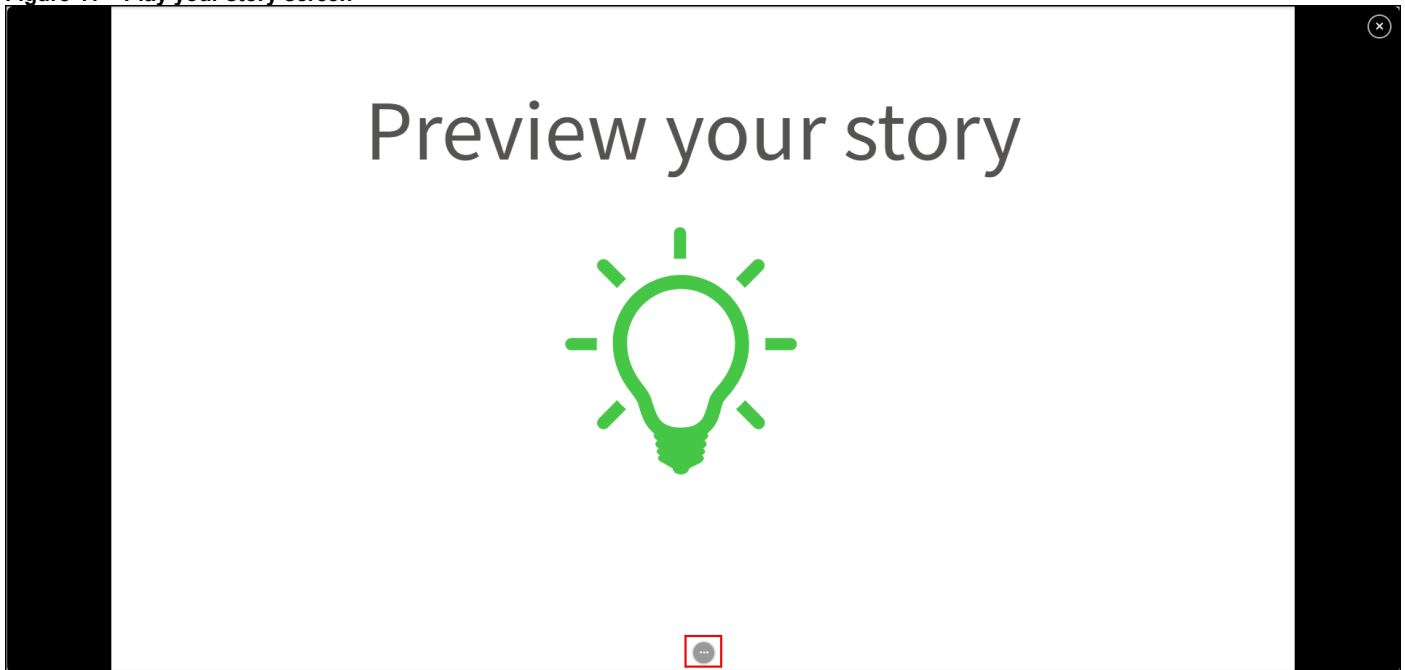
To preview your story, choose the Story you are working on. On the Story page, select **Play**  on the top right of the screen.

Figure 40 – Play your story button



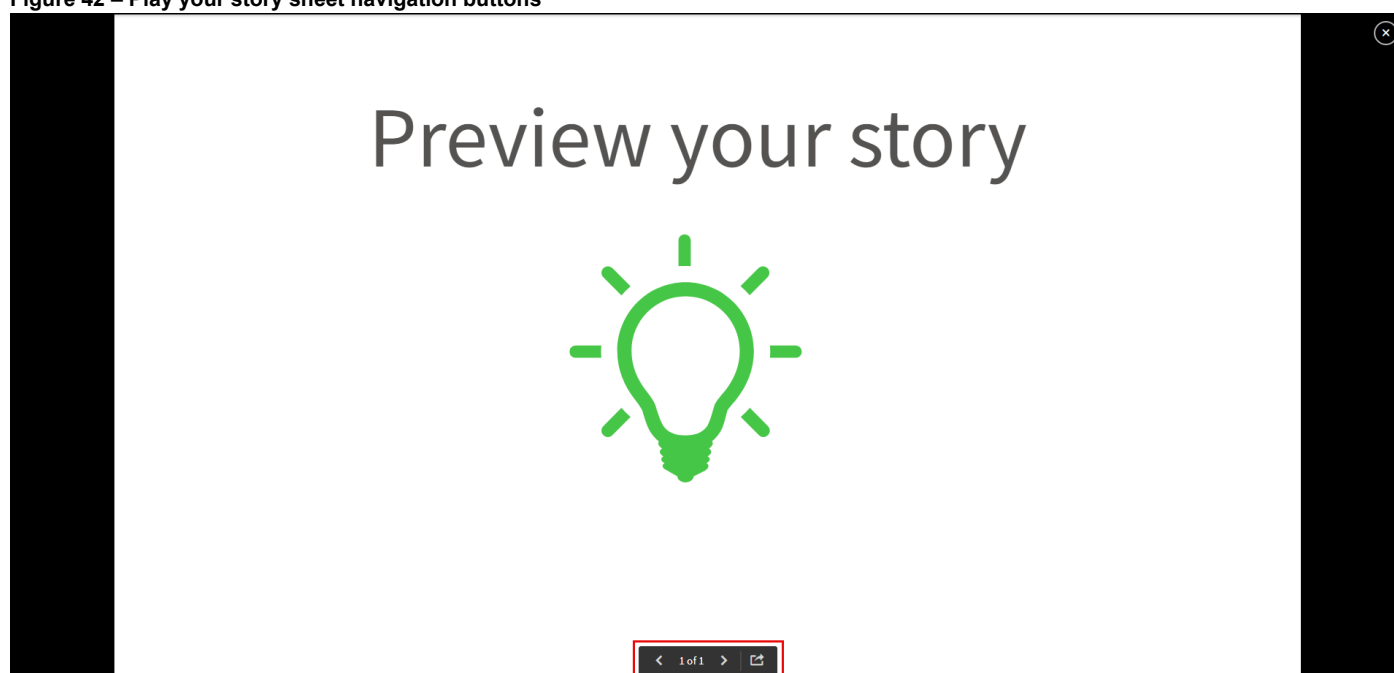
The Story will display in preview mode.

Figure 41 – Play your story screen



If you select **Actions** button  at the bottom of the screen, the **sheet navigation** buttons will display.

Figure 42 – Play your story sheet navigation buttons



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

Select the **Export** button  to export the story to PowerPoint or PDF.

Select the **Close** button  to exit the preview.

Export the story

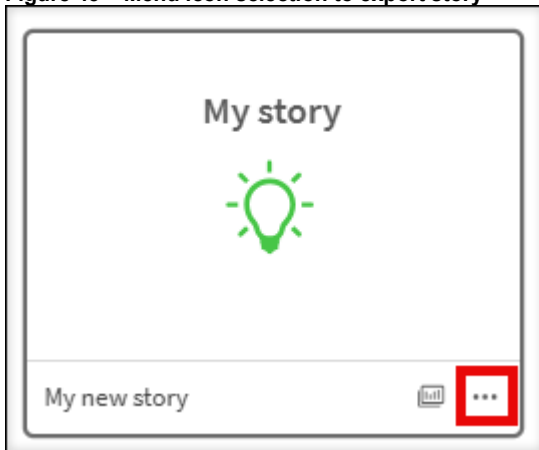
If you want to print or play the story outside of the Data Exchange Application, you will need to export the Story **beforehand**.

Table 1 –Export options navigation items

Item	Description
 Download as Power Point	Select the Export story to PowerPoint button to send the story to PowerPoint.
 Download as PDF	Select the Export story to PDF button to send the story to PDF.
 Duplicate	Select the Duplicate story button to make a copy of the original story.
 Delete	Select the Delete story button to remove the story.
 Details	Select the Details button to edit the details of the story.
Aa Rename	Select the Rename button to rename the story.
	Select the Menu icon to export the story.

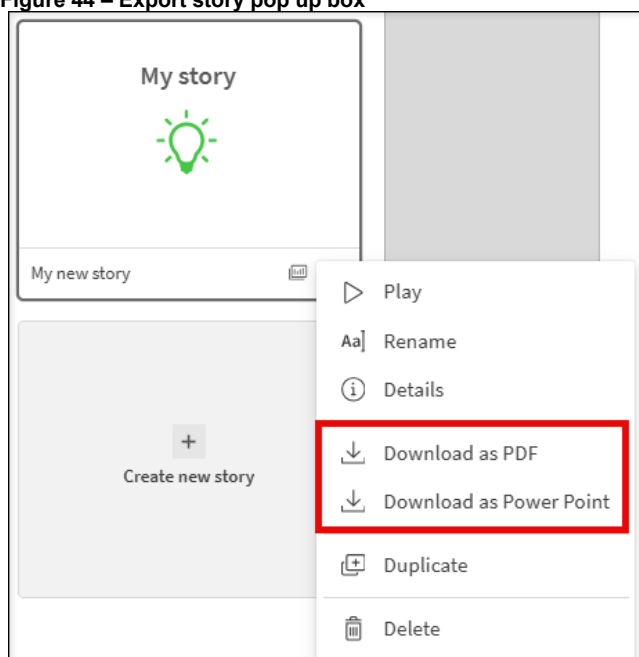
On the Story page, select the **Menu** icon  at the bottom right of screen to export the story to PDF or PowerPoint.

Figure 43 – Menu icon selection to export story



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

Figure 44 – Export story pop up box



You can export your story as a PowerPoint or PDF.

Export story to PowerPoint

Make the appropriate changes to the **PowerPoint settings** then select **Export**

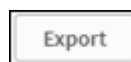


Figure 45 – PowerPoint settings pop up box

PowerPoint settings

Slide size

Custom ▼

Width (pixels)

- 1198 +

Height (pixels)

- 673 +

Resolution (dots per inch)

220 ▼

1198 x 673 px @ 220 dpi

Cancel Export

Select the **PowerPoint hyperlink** that displays.

Figure 46 – Click to download PowerPoint hyperlink

PowerPoint settings

Slide size

Custom ▼

Width (pixels)

- 1198 +

Height (pixels)

- 673 +

Resolution (dots per inch)

220 ▼

1198 x 673 px @ 220 dpi

[Click here to download your PowerPoint presentation.](#)

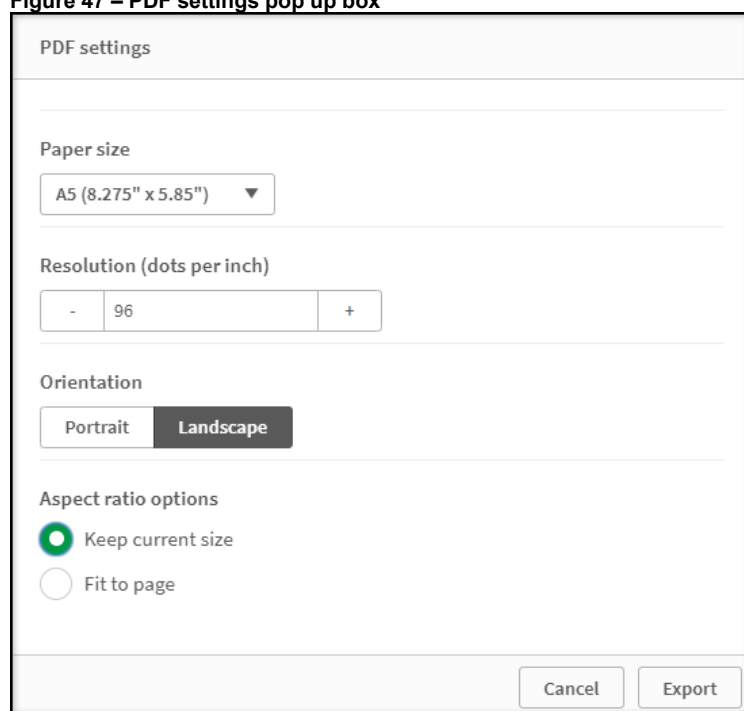
Cancel Export

Export story to PDF

Make the appropriate changes to the **PDF settings** then select **Export**

Export

Figure 47 – PDF settings pop up box

A screenshot of a 'PDF settings' dialog box. It has a title bar 'PDF settings'. Below it, there are sections for 'Paper size' with a dropdown menu showing 'A5 (8.275" x 5.85")', 'Resolution (dots per inch)' with a numeric input set to '96' and minus/plus buttons, 'Orientation' with 'Portrait' and 'Landscape' buttons (Landscape is selected), and 'Aspect ratio options' with 'Keep current size' (selected) and 'Fit to page' radio buttons. At the bottom right are 'Cancel' and 'Export' buttons.

PDF settings

Paper size

A5 (8.275" x 5.85")

Resolution (dots per inch)

- 96 +

Orientation

Portrait Landscape

Aspect ratio options

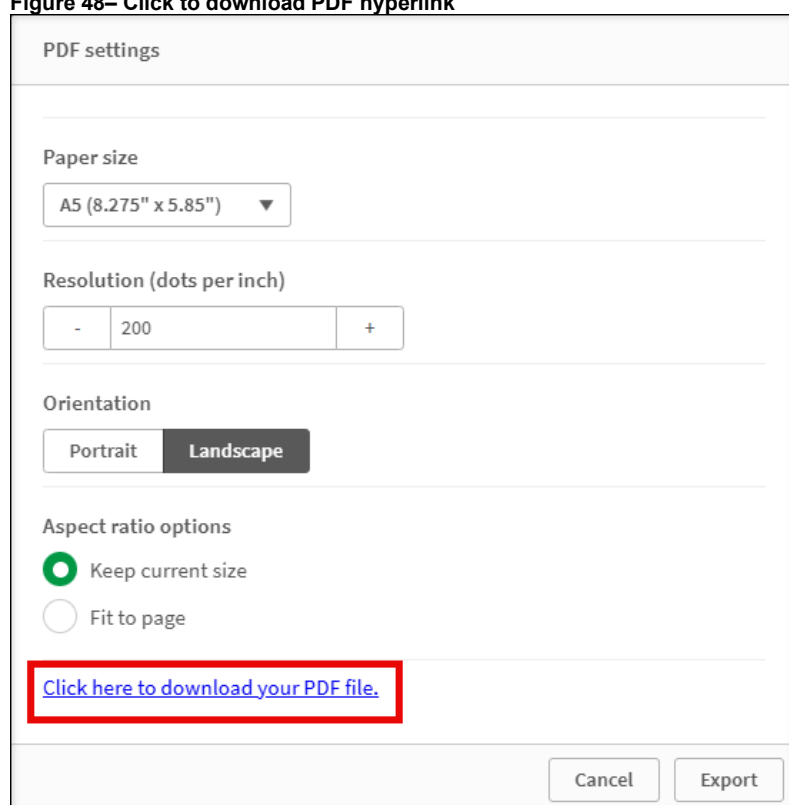
☒ Keep current size

☐ Fit to page

Cancel Export

Select the **PDF hyperlink** that displays.

Figure 48– Click to download PDF hyperlink

A screenshot of the 'PDF settings' dialog box, similar to Figure 47, but with an additional blue hyperlink 'Click here to download your PDF file.' at the bottom, enclosed in a red rectangular box. The rest of the settings are the same as in Figure 47.

PDF settings

Paper size

A5 (8.275" x 5.85")

Resolution (dots per inch)

- 200 +

Orientation

Portrait Landscape

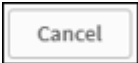
Aspect ratio options

☒ Keep current size

☐ Fit to page

[Click here to download your PDF file.](#)

Cancel Export

If required, select **Cancel**  to stop the download.

You can find more information on reporting requirements in the [Data Exchange Protocols](#). For further information on reports functionality, please visit the [Training](#) tab of the Data Exchange website.

For system support, email the [Data Exchange Helpdesk](#) use our [online contact form](#).