# USG Qlik Data Analytics Portal Instructions

**Overview**
The University System of Georgia has partnered with the UGA Carl Vinson Institute of Government to develop a data portal accessible to users at each campus. The data housed within the portal come from a variety of sources including system data, IPEDS (The Integrated Postsecondary Education Data System), and GOSA (the Governor's Office of Student Achievement).

**Note**
Use of the USG Qliksense Applications requires users to have completed training in and received a FERPA certification, which must be up-to-date while accessing the portal. Registered Qlik users employed by a member institution of the University System of Georgia and System employees may receive no-cost FERPA certification at the University of Georgia through an arrangement with the Carl Vinson Institute of Government. If your institution does not provide FERPA certification or you do not have access to a FERPA training course and certification process, please email James Byars of the Vinson Institute at jmbyars@uga.edu.

Click **here** to log into the USG Qlik Data Analytics Portal.

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**User Access & Tokens**
Users access to Qliksense is based upon the *token* users have been granted, with two distinct types of tokens available: developer tokens, and pooled tokens.

1. *Developer Tokens*
   Each USG institution will receive one (1) developer token, which provides the designated user with unlimited access to Qliksense applications, as well as the ability to create their own applications. Unless otherwise arranged/requested, the developer token will be assigned to the institution's Institutional Research Director (or equivalent).

   *To request a different user be assigned the Qliksense developer token for your campus, please contact Hong Zeng, the Carl Vinson Institute of Government Program Coordinator for State Services and Decision Support, at hzeng@uga.edu.*

2. *Pooled Tokens*
   Pooled tokens also provide users with access to the data applications, though unlike the Developer tokens, these tokens are limited to read only access and thus users are unable to edit or create their own applications. Pooled tokens can be assigned to up to twenty (20) users each, with users sharing an allotment of ten (10) hours of access.

**Process for Requesting Portal Access & Token Distribution**
Access to the USG QlikSense portal is administered by the UGA Carl Vinson Institute of Government. Given the limited number of developer and pooled tokens available, the process outlined below requires approval at both the institutional and Board of Regents levels, before granting user access.

1. **Request Access from the IR Directory**
   For all institutions, requests for access to the data portal should be submitted to the developer token holder (by default, the Institutional Research director or equivalent).

2. **IR Director Review; if Approved, Forwards Request to USG BOR**
   The developer token holder at each institution will review access/token requests and will approve or deny as appropriate. Please note, the developer token holder at each institution should keep track of the number of users on their pooled tokens, and update lists/access regularly.

3. **BOR Staff Review; if Approved, Forwards Approval to Carl Vinson Institute.**
   If approved, the developer token holder will forward the request for access via email, to University System of Georgia Board of Regents Research Associate Lori Hagood, Ph.D, at Lori.Hagood@usg.edu, who will review the request.

4. **User Added to Qliksense Portal; User and IR Director Notified**
   Following review, USG BOR staff will provide a list of approved individuals to the Carl Vinson Institute of Government who will subsequently add the user to their respective institution's pooled token, and provide account credentials for users. Both the requesting user and developer token holder at the respective institution will be notified once access is granted.

**Accessing Qlik**
Click **here** to log into the USG Qlik Data Analytics Portal.

**Application Hub**
After logging into Qlik, you will see a menu on the left hand side of your screen. Under the "Streams" section, select "USG BOR" (noted below).
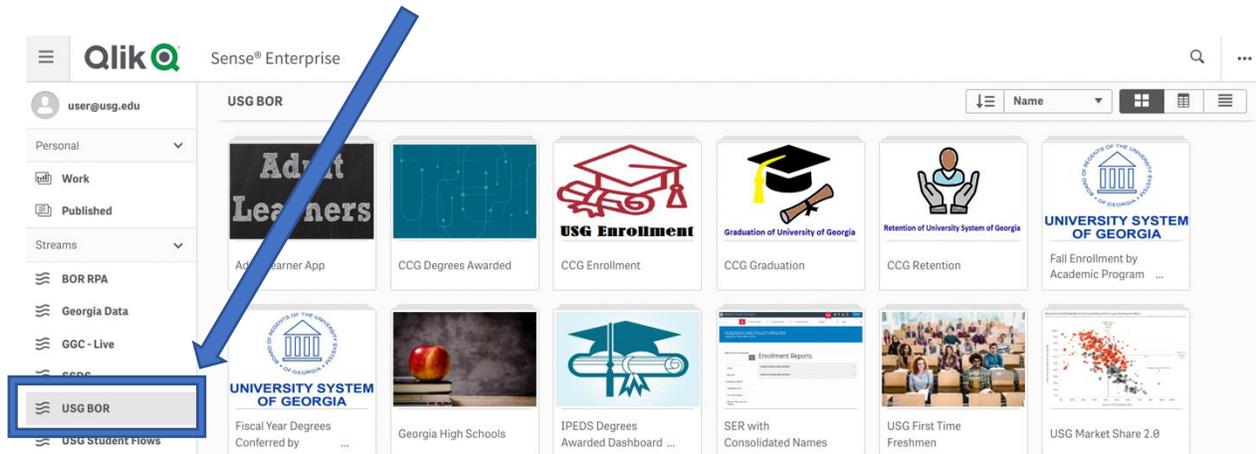


Each tile in the Application Hub (image above) represents a different Qlik "Application", with each application giving users access to a different set of data and analytic dashboards. Clicking on a tile will load the application.

**In Application: "Sheets"**
After loading an application (for example, "Fall Enrollment by Academic Program (407a) as shown below), the first page will show the user all "Sheets" within the application. A sheet can represent a different visual data view, additional information on the data being loaded, or new context for users. Similar to applications in the Application Hub, sheets are represented as tiles (clicking any tile will load the sheet in a new browser tab).
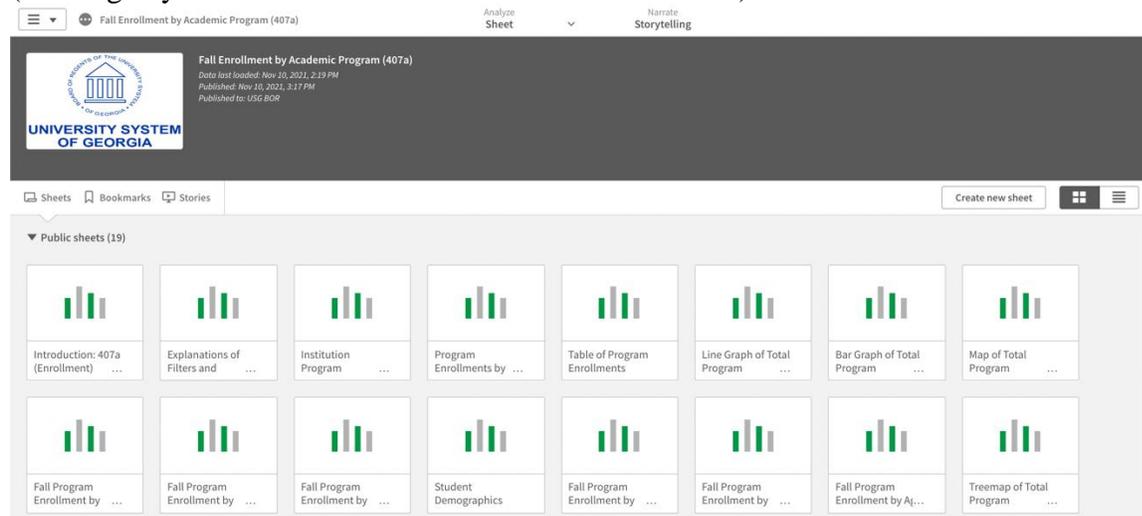
## In Application: "Filters"

Data sheets in Qlik offer users tools to pare down the data being displayed according to user interests. One of the most useful features in Qlik are "filters."  Similar to filters in Microsoft Excel, filters in Qlik allow users to include or exclude data of interest. In examples A and B respectively, the user is interested in examining program enrollment data for Kennesaw State University's Computer and Information Sciences programs and uses filters to include only relevant data to said programs.

## Example A

User selects "Institution" filter to choose Kennesaw State University.

## Example B

User selects "CIP 2 digit Description" filter to Choose "Computer and Information Sciences."



To apply the filter, click the green checkmark button. After applying the filters, the data shows only data for enrollment Computer and Information Sciences programs at the 2 digit-CIP code level, specifically for Kennesaw State University. Currently applied filter selections now appear in the bar above the filter buttons (pictured below).

**Last Updated: 12/11/21**

## Exporting Data

When working in a data table in Qlik, if you wish to export the data in order to use it in a different program, you can do so by right clicking anywhere in the table. Right-clicking in the table will display the table menu (shown here):

**Enlarged menu shown below.**



- Copy cell value
- Full screen
- Share ▶
- Take snapshot
- Snapshot library
- Download as... ▶



On the table menu, click "Download as…" and select "Image", "PDF", or "Data" (to export to Microsoft Excel format (.xlsx)).

**Help Guides**

For your reference, a video series demonstrating Qlik use and currently available applications has been developed to aid users in understanding access, navigation, and features within Qlik, and how data can be used to complete USG system reports. To access the video playlist, click here.
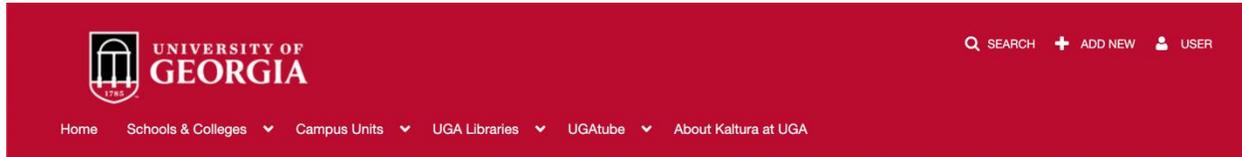


**Restricted Streams: "USG Student Flows"**

Note that the stream named "USG Student Flows" is available only to users who have undergone the required instructional training on how to use the applications therein. If you are interested in gaining access to this stream, please contact: *Hong Zeng, the Carl Vinson Institute of Government Program Coordinator for State Services and Decision Support, at hzeng@uga.edu.*

**Getting Emails from Qliksense**

Add Qliksense to your list of email contacts in order to avoid Qliksense emails being sent to your spam folder. If you are expecting an email from Qlik but have not yet taken this step, be sure to look in your spam folder, as the email may have been filtered out of your inbox.

**Need Additional Help? Contact Us:**

Hong Zeng
Email: hzeng@uga.edu
Carl Vinson Institute of Government Project Coordinator

**Last Updated: 12/11/21**