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Overview

Introduction

A bookmark saves your filter selections in an app/module, so the next time you want to retrieve those same filters, you can simply select your bookmark. It is highly recommended you create bookmarks for your most commonly selected filters. Bookmarks are easy to create and save you time.

A bookmark can be created to:

- save your selections only (and apply them to any sheet)
- save your selections and take you directly to a specific sheet in an app/module.

A bookmark also provides you the ability to save any layout changes such as, moved columns.

Resources

Check the links below for more information about using bookmarks in UBI Analytics (Qlik Sense®).

- Create a "favorites" list in the UBI User Hub
- Share objects and bookmarks in Qlik Sense



For best results, it is recommended that you use Chrome™ to access UBI Analytics apps.



Bookmarks

Create a Bookmark

| Step | Action |
|------|---|
| 1. | Select the filters you want to save in your bookmark. If you want your bookmark to also take you to a specific sheet, then go to that sheet as well. |
| 2. | Click the Bookmarks button, then click Create new bookmark . |
| | Analyze Narrate Storytelling |
| | Bookmarks Create new bookmark |
| | Q Search |
| | Public bookmarks (2) |
| | Enrollment by Major and Minor - duplicated - Degree Level = SP; Term 2018 Fall Census 4/9/2019 On Open Selections (Census-Enrolled for Credit-On Grounds) Default 3/26/2020 |
| | Community bookmarks (5) |
| | ENG Enrollment by Primary Degree 10/6/2020 |
| 3. | Type a name for your bookmark in the Title field. Optionally, add a description. |
| 4. | The sheet location is saved by default. If you only want to save your selections and not have your bookmark be associated with the specific sheet, then clear this option. |

Quick Reference Guide – Bookmarking in UBI Analytics

| Step | Action |
|------|---|
| 5. | If you've made any changes to the layout of the sheet, such as moving column locations and you want to perserve these changes in your bookmark, then select the Save layout option. Otherwise, leave this option as is (unselected). |
| 6. | Click Create. |
| | Create bookmark × |
| | Title |
| | Test Bookmark |
| | Description (Optional) This is a test bookmark |
| | |
| | Save sheet location |
| | Save layout 🚯 |
| | Create |
| 7. | Click the green checkmark or simply click outside the Bookmarks window. |
| | Your bookmark is added to your bookmarks list. |
| | Title |
| | Test Bookmark Description |
| | This is a test bookmark |
| | (n) |
| | Location: Unduplicated Counts by Primary Academic Program School Layout state: Saved |
| | To delete a bookmark, right-click on the bookmark and select Delete . |

Select a Bookmark

You can select a bookmark to:

- apply the selections in the bookmark and jump to the sheet where the bookmark was created
- only apply the selections from a bookmark to your currently selected sheet

| Step | Action | |
|------|---|---------------------|
| 1. | To select your bookmark, click the Bookmarks button and then select the bookm | ark. |
| | Analyze Narrate Sheet V Storytelling Duplicate Unduplicated Con | ints □ ▼ < > |
| | Bookmarks | Create new bookmark |
| | Q [Search | |
| | e ▼ Public bookmarks (2) | |
| | Enrollment by Major and Minor - duplicated - Degree Level = SP; Term 2018 Fall Census | 4/9/2019 |
| | On Open Selections (Census-Enrolled for Credit-On Grounds) Default | 3/26/2020 |
| | Community bookmarks (5) | |
| | ENG Enrollment by Primary Degree | 10/6/2020 |
| | ENU Enrollment by Academic Level | 10/6/2020 |
| | Total UVA Enrollment (degree seeking) | 10/19/2020 |
| | ASEE - CS BA Enrollment (w/ 2nd majors) by Academic Level | 11/3/2020 🕤 |
| | ASEE - Masters FT-PT Enrollment by Primary Degree | 11/9/2020 |
| | V My bookmarks (11) | |
| | All Majors | 12/10/2019 |
| | Test Bookmark | 4/28/2020 |
| | Arch test | 4/29/2020 |
| | First Generation - UGRAD First Gen - UGRAD (My Sheet) | 5/4/2020 |
| | First Gen - UGRAD (Trends) | 5/6/2020 |
| | Bookmark | 5/18/2020 |
| | Majors in Eng | 5/19/2020 |
| | | |
| | Not all modules will include Public and/or Community bookmarks like see above. | |
| 2. | To only apply your bookmark selections to a sheet, click the Bookmarks button, the bookmark and select Apply selections only . | nen rignt-click |
| | ▼ My bookmarks (11) | |
| | All Majors | |
| | All Majors | |
| | Test Bookmark | |
| | Arch tes Apply bookmark | |
| | First Ge Apply selections only | |
| | First Ge View details | |
| | First Ge view details | |
| | This will apply the selections from the bookmark to the <i>currently</i> selected sheet. bookmark was set up to jump directly to another sheet, it will not take you to that | |



Edit a Bookmark and Copy the Selections

You can edit the title and description of a bookmark.

You can also copy the selections in your bookmark and paste them into an email or document (e.g., export to Excel file). This is especially helpful when sharing a report via an exported Excel spreadsheet or a link with someone to let them know what selections were used to produce the data in the report.

If you want to add a new selection (filter) to an existing bookmark, you must create a brand new bookmark. You cannot add a new selection to an existing bookmark.

| Step | Action | |
|------|---|--------|
| 1. | Hover your mouse over the Bookmark and click the Details icon. | |
| | ▼ My bookmarks (14) | |
| | First Generation - UGRAD 5/4/2020 | |
| | First Gen - UGRAD (My Sheet) 5/4/2020 | |
| | First Gen - UGRAD (Trends) 5/6/2020 | |
| | Majors in Eng 5/19/2020 | |
| | My sheet: Academic program & Primary Academic Program 2/1/2021 | |
| | Click the Edit button and then edit the bookmark title and description. Click Copy to copy the saved bookmark selections and then paste them in an email of (e.g., the export of a report to Excel). | r file |
| | Location: Unduplicated Counts by Primary Academic Program School Layout state: None <default state="">: Selections: First Generation, On/Off Grounds Filter, Dataset, Term Desc, Enrollment Filter, Student Filter Set expression {<[First Generation]={ First Generation},[On/Off Grounds Filter]={ On- Grounds},Dataset={ Census},[Term Desc]={ 2020 Spring},[Enrollment Filter]={ Enrolled Copy</default> | |

Copy Dashboard

The Copy Dashboard button allows you to copy your current selections in a Public Sheet and create a link to share with other UBI users. You can then paste that link into an email and send it to other users. When the recipient(s) click the link, it will open the same sheet with your selections. Note, the user must have security to access the UBI module.

| The Copy Dashboard but | utton is not available in all | UBI Analytics modules. |
|------------------------|-------------------------------|------------------------|
|------------------------|-------------------------------|------------------------|

| Step | Action |
|------|---|
| 1. | After making selections in a Public sheet, click Copy Dashboard. |
| | Analyze Narrate Sheet V Storytelling |
| | Term Desc 2020 Fall Selections |
| | UBI |
| | unds Filter Academic Program Degree Level Primary Acad Program |
| | |
| | |
| | |
| 2. | In Outlook, create a new message and paste the link (Ctrl + V) into the email. Then, send the |
| | link to other UBI users with the appropriate security to access the module. |
| | Copy Dashboard Link - Message (HTML) D C - □ × File Message Insert Options Format Text Review Help Acrobat Q Tell me what you want to do |
| | |
| | Paste 3 B I U 2 2 A Signature Address Check Book Names B Signature Asign I Dictate Sensitivity View Templates Insights |
| | Clipboard 🛐 Basic Text 🛐 Names Include Tags 🛐 Voice Sensitivity My Templates |
| | From ~ Icb5t@virginia.edu |
| | Send To |
| | Subject Copy Dashboard Link |
| | https://gsenseprod.admin.virginia.edu/sense/app/c9eb33b1-6e60-4cb3-9303-3b5a02d1b685/sheet/fb4a9e18-e621-48e2-8516- |
| | 74b06ddd1398/state/analysis/options/clearselections/select/On%2FOff%20Grounds%20Filter/On-Grounds/select/Dataset/Census/select/Term%20Desc/2019% 20Fall/select/Academic%20Plan%20Type/Major/select/Academic%20Plan%20School/Engineering/select/Enrollment%20Filter/Enrolled%20for%20Credit |
| | |
| | |

NOTE

If you Copy Dashboard from a published (My sheet) / Community sheet and share it with someone, then it should take them directly to that sheet. However, due to cache issues, it may not behave as expected unless the browser session is fresh for the person who is sharing and the person who is receiving the link. For Community sheets, use Community bookmarks to share links.