Bookmarking in UBI Analytics
Quick Reference Guide

UBI *UNIVERSITY BUSINESS INTELLIGENCE*

Content Links

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

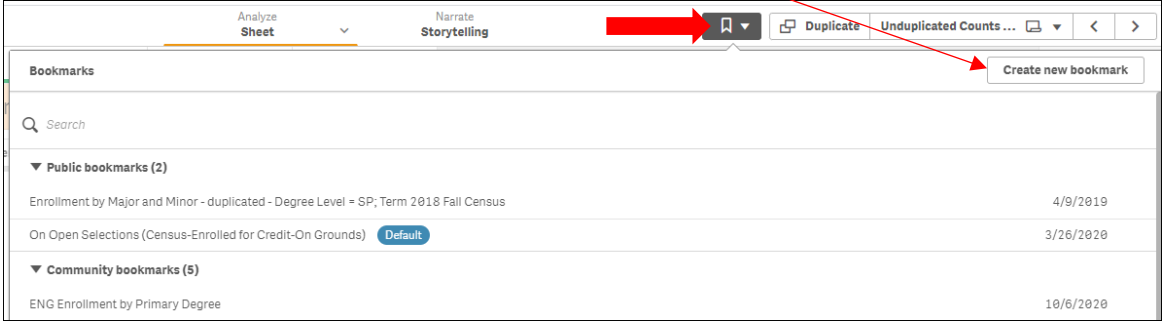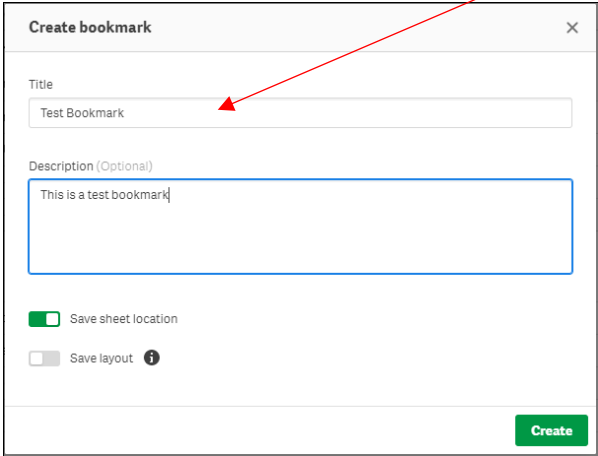Check the links below for more information about using bookmarks in UBI Analytics (Qlik Sense®).
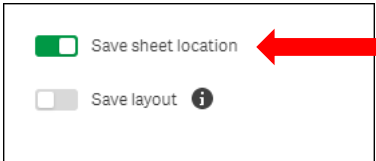
- Create a "favorites" list in the UBI User Hub
- Share objects and bookmarks in Qlik Sense

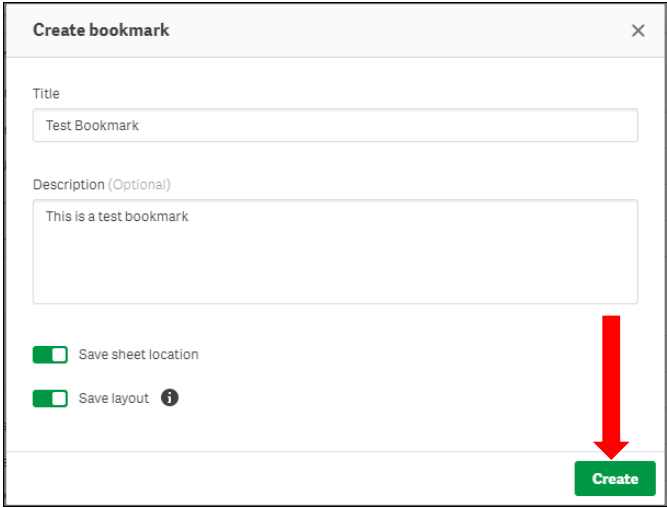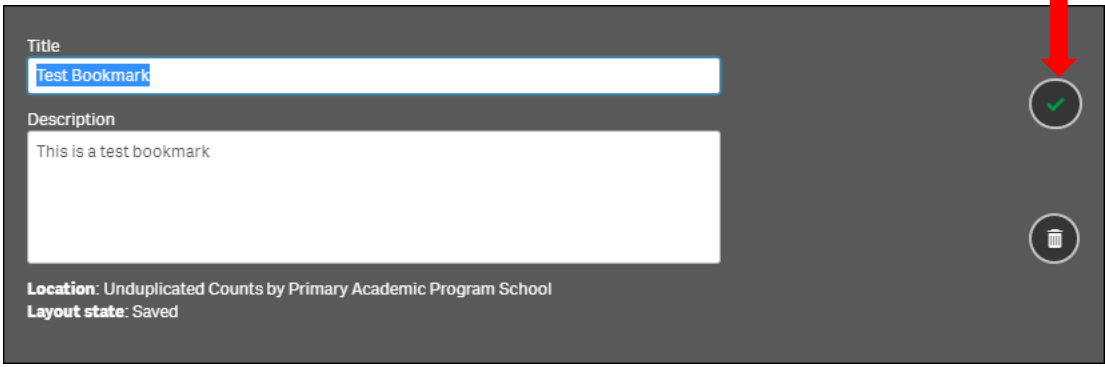| NOTE	For best results, it is recommended that you use Chrome™ to access UBI Analytics apps.

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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**.
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.

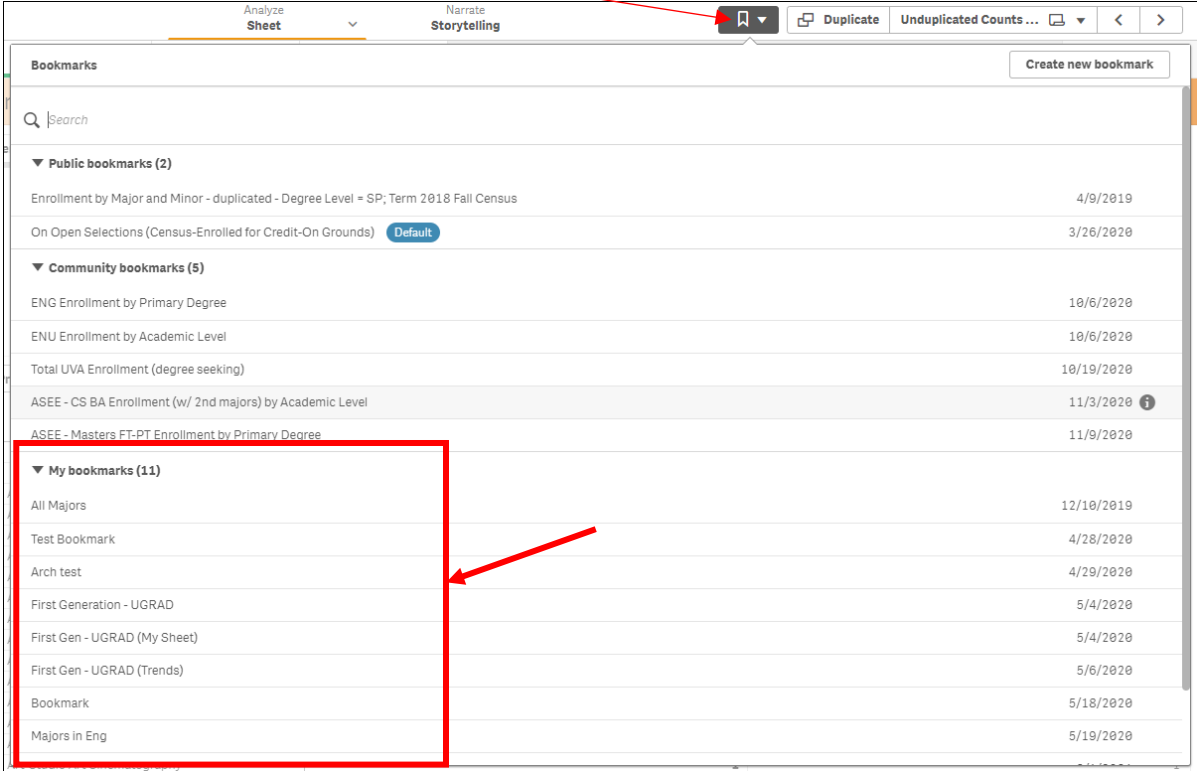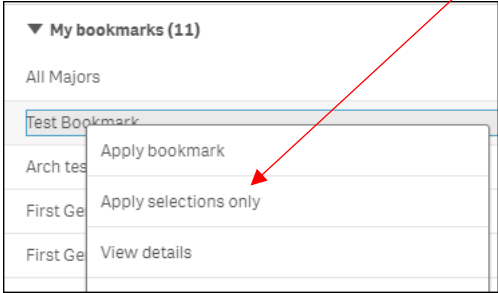| Step	Action
5.	If you've made any changes to the layout of the sheet, such as moving column locations and you want to perserve these changes in your bookmark, then select the **Save layout** option. Otherwise, leave this option as is (unselected).
6.	Click **Create**.
7.	Click the green checkmark ⊘ or simply click outside the Bookmarks window. Your bookmark is added to your bookmarks list.

HINT 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
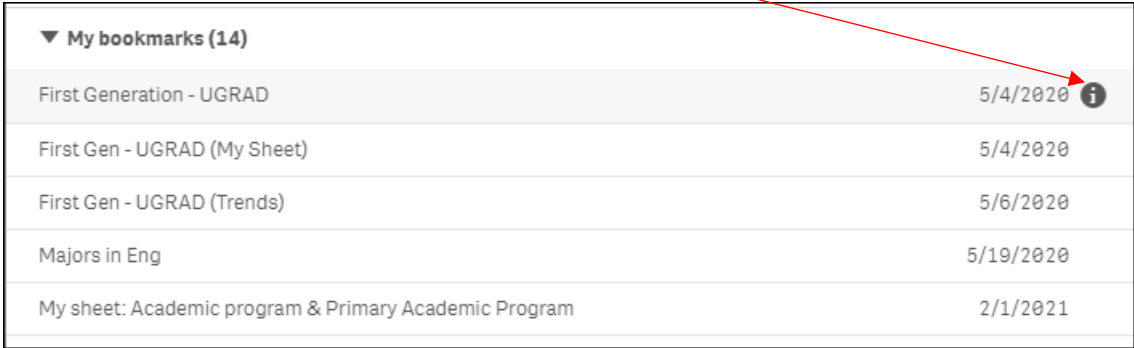- only apply the selections from a bookmark to your currently selected sheet
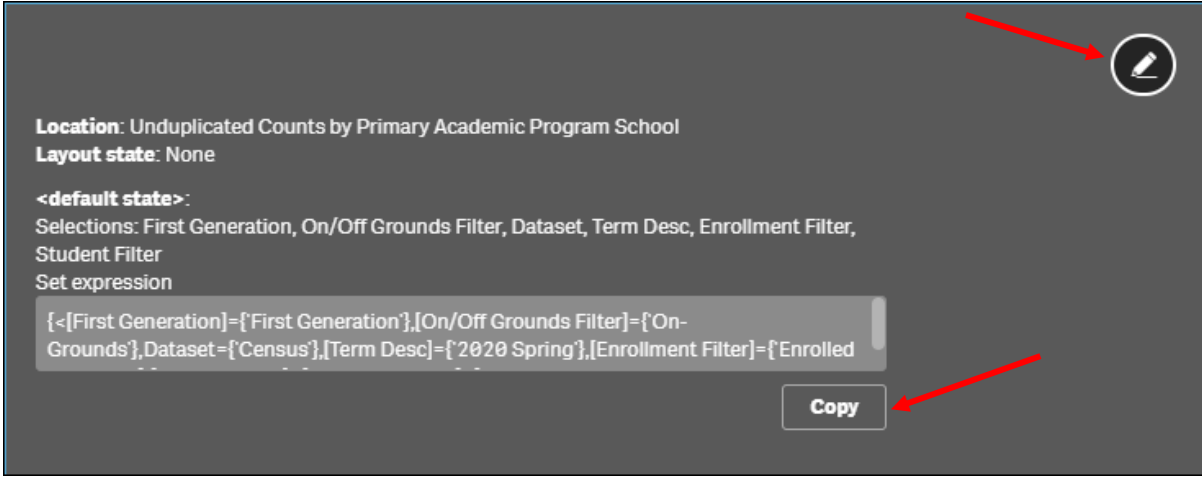
Step	Action
1.	To select your bookmark, click the **Bookmarks** button and then select the bookmark. **NOTE** Not all modules will include Public and/or Community bookmarks like seen in the graphic above.
2.	To only apply your bookmark *selections* to a sheet, click the **Bookmarks** button, then **right-click** the bookmark and select **Apply selections only**. This will apply the selections from the bookmark to the *currently selected* sheet. That is, if the bookmark was set up to jump directly to another sheet, it will not take you to that sheet.

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.
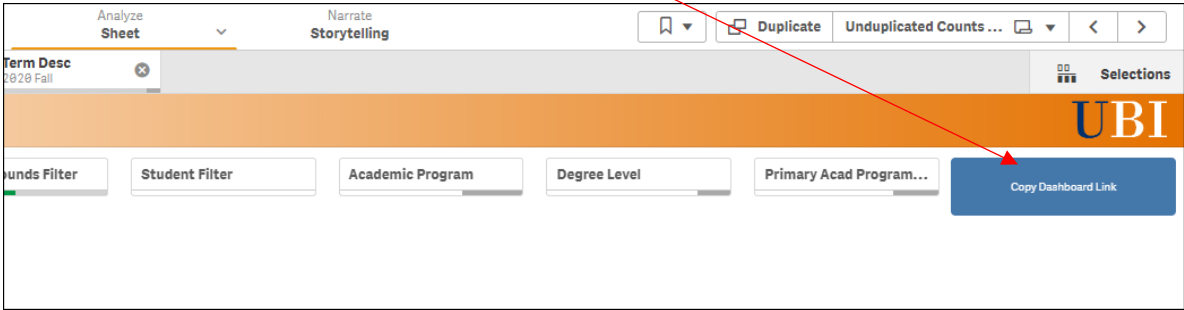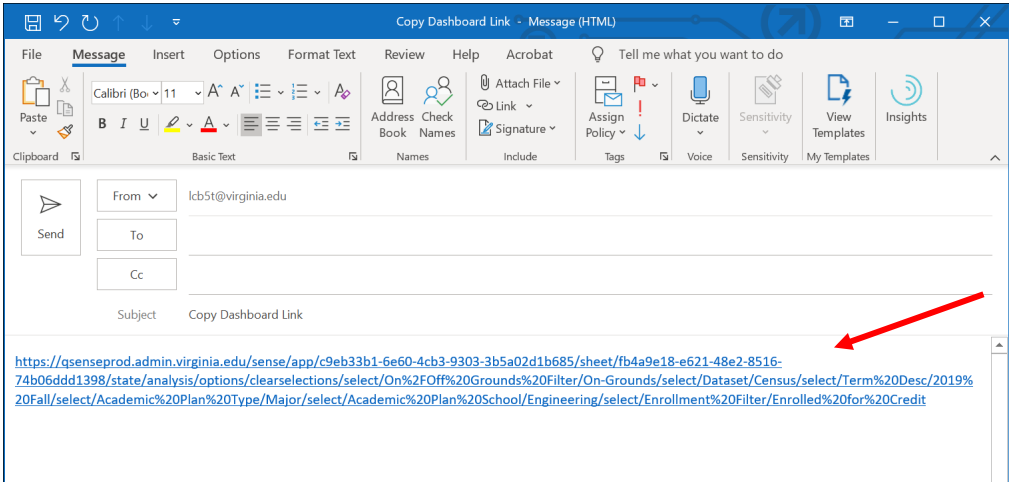
Step	Action
1.	Hover your mouse over the Bookmark and click the **Details** icon. ▼ My bookmarks (14) First Generation - UGRAD — 5/4/2020 ⓘ First Gen - UGRAD (My Sheet) — 5/4/2020 First Gen - UGRAD (Trends) — 5/6/2020 Majors in Eng — 5/19/2020 My sheet: Academic program & Primary Academic Program — 2/1/2021
2.	Do any of the following: • 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 or file (e.g., the export of a report to Excel). **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

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 button is not available in all UBI Analytics modules.

Step	Action
1.	After making selections in a Public sheet, click **Copy Dashboard**.
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.

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.