

## Overview

This QRG is designed to walk employees who have the *EDW\_P\_Finance* role with duplicating and editing an existing sheet in a UBI Analytics module to create a new personalized My sheet. Publishing, unpublishing and deleting a My sheet is also covered.



For best results, it is recommended that you use the Chrome™ web browser to access UBI Analytics (Qlik Sense®).

## Duplicate and Edit My sheet



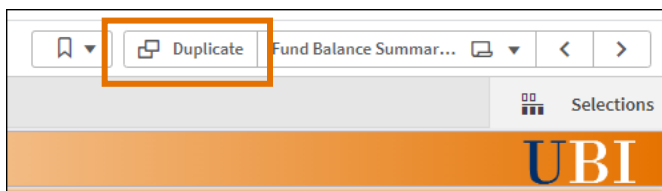
For example purposes, the following procedure is based on editing a **straight table** in the *Workday Fund Balances* module, but the same steps can apply to any UBI Analytics module. However, other chart types, such as a pivot table or bar chart have different options available in the Properties panel; but the general steps for adding and deleting dimensions/measures and changing the appearance of your My sheet are the same.

Duplicate a sheet:

1. Do one of the following to access UBI Analytics:

To access by the...	Do this...
UBI User Hub	<ul style="list-style-type: none"> <li>Go to this link: <a href="https://ubihub.admin.virginia.edu/">https://ubihub.admin.virginia.edu/</a></li> <li>Search for and select the desired module.</li> </ul>
Qlik Sense Hub	<ul style="list-style-type: none"> <li>Go to this link: <a href="https://qsenseprod.admin.virginia.edu/hub/">https://qsenseprod.admin.virginia.edu/hub/</a></li> <li>Select the <b>Finance</b> stream.</li> <li>Select the desired module.</li> </ul>

2. Select the **Public sheet** you want to edit.
3. Select your filter selections for viewing the data.
4. Click the **Duplicate** button at the top right of the screen.



A duplicate of the sheet is created, and the Properties panel displays on the right-side of the screen. The Sheet title displays a (1) at the end. The number increments for each copy of the same sheet you duplicate,

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Change the Sheet properties:

5. In the **Sheet properties**, click in the **Title** field and update the Sheet title.

The screenshot shows the UBI Analytics interface. The main table displays various fund balance data across columns for VP/MBU Level, Department Level, and Cost Center. On the right, the 'Sheet properties' panel is open, and the 'Title' field is highlighted with a blue border, showing the current title 'Fund Balance Summary (FD, DN, GF) (1)'.

6. In the **Thumbnail** field, click the **Change Thumbnail** icon and select an image from the Media library (In app or Default) and click **Insert**. This is optional; you can leave the thumbnail as is.

Edit the table visualization:

7. Click the table visualization to select it. A “green” box displays around the table to indicate it has been selected and the Properties panel updates for your selection on the right-side of the screen.

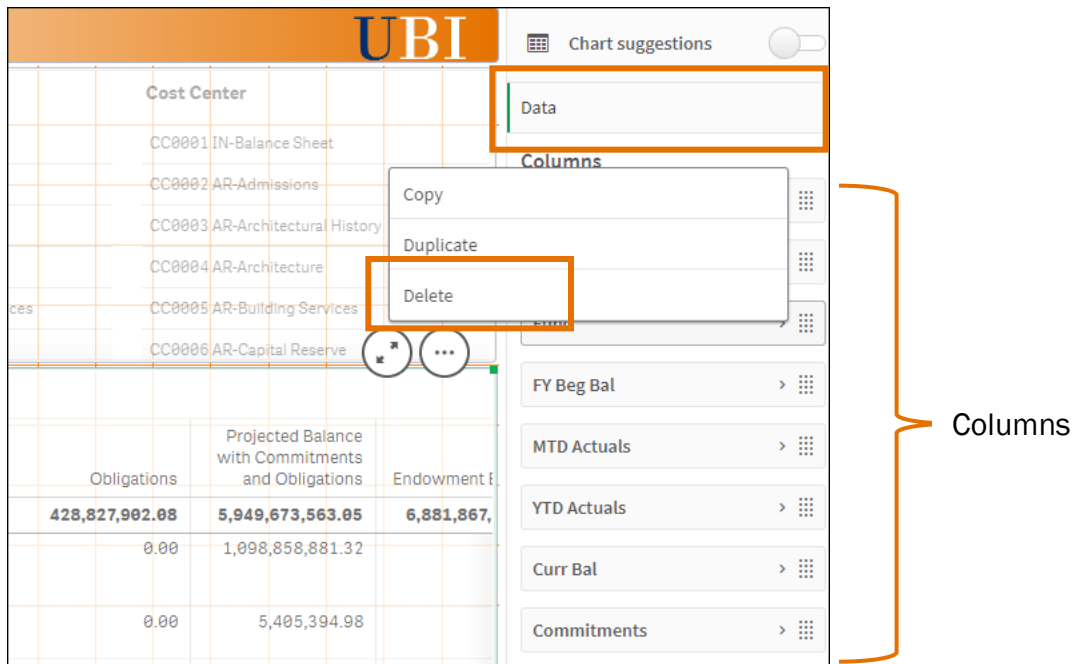
The screenshot shows the UBI Analytics interface with a table visualization. The table is highlighted with a green border, and the 'Properties' panel on the right is open, showing the 'Data' tab selected. The table contains financial data with columns for AsOfPeriod, Fund Balance Type, Company, VP/MBU Level, Department Level, Cost Center, and various financial metrics.

AsOfPeriod	Fund Balance Type	Company	VP/MBU Level	Department Level	Cost Center								
Apr-23	Expendable Fund Balance	UVA, 197 The Rector & Visitors of the Univ...	CH48801 AS-College of Arts & Sciences	CH28394 AS-Administration	CC8050 AS-Dean's Office (DEAN)								
Jun-22	Excluded from Expendable Fund Balance	ALU, 1900 Alumni Association of the Univ...	CH48802 AT Intercollegiate Athletics	CH28395 AS-Department-Humanities	CC8001 IN-Balance Sheet								
Jul-22		CH, 898 Community Medicine (UVA, LLC	CH48803 BA-Batten School	CH28399 AS-Program/Center/Institute-S...	CC8002 AR-Admissions								
Aug-22	Use the Fund Balance Type to select "Expendable Fund Balance" and/or "Excluded from Expendable Fund Balance" depending on your needs.	COL, 989 The College Foundation of the U...	CH48804 BU-Business Operations	CH28399 AS-Program/Center/Institute-S...	CC8003 AR-Architectural History								
Aug-22		UVA, 1958 University of Virginia Gorden Sch...	CH48805 CO-EVP-COO	CH28399 AS-Program/Center/Institute-S...	CC8004 AR-Architecture								
Oct-22		IMG, 989 Imaging LLC	CH48806 ED-School of Education & Huma...	CH28399 AS-Program/Center/Institute-S...	CC8005 AR-Building Services								

Delete a column:


8. In the **Properties** panel, select **Data**.
9. Right-click the column you want to delete and select **Delete**.

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The screenshot shows the UBI Analytics interface. The 'Columns' panel is open, displaying a list of columns. A context menu is open over the 'Columns' list, showing options: Copy, Duplicate, and Delete. The 'Delete' option is highlighted. A bracket on the right side of the 'Columns' panel is labeled 'Columns'.

Cost Center	Projected Balance with Commitments and Obligations	Endowment f
CC0001 IN-Balance Sheet		
CC0002 AR-Admissions		
CC0003 AR-Architectural History		
CC0004 AR-Architecture		
CC0005 AR-Building Services		
CC0006 AR-Capital Reserve		
Obligations	428,827,902.08	5,949,673,563.05
	0.00	1,098,858,881.32
	0.00	5,405,394.98

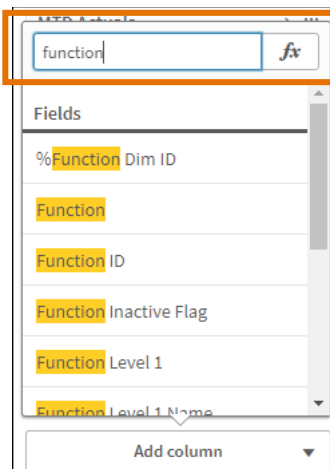


Use the **Undo** and **Redo** buttons at the bottom of the screen to undo or redo your last action.



Add a column:

10. In the **Properties** panel, click **Add column**.
11. Select **Dimension** or **Measure** depending on what you want to add to the table.
12. Search for the dimension (e.g., Function) or measure (e.g., FYTD Expenses) and select it from the list.



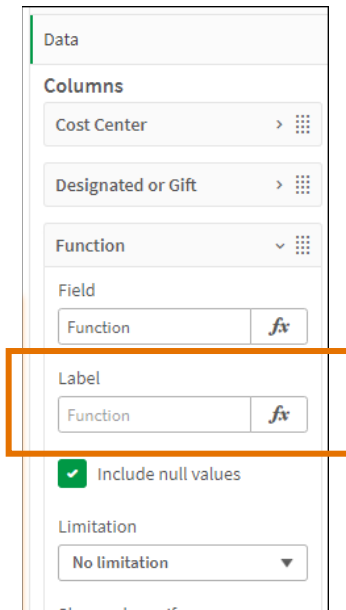
The screenshot shows the 'Add column' dialog box. The search bar contains the text 'function'. The list of fields below shows several options, including '%Function Dim ID', 'Function', 'Function ID', 'Function Inactive Flag', 'Function Level 1', and 'Function Level 1 Name'. The 'Add column' button is at the bottom.

13. The column is added to the bottom of the list. Click the **Move** icon on the right-side of the label and drag it to the desired location in the list.



14. Optionally, to change the name of the column, click on the column to expand it.

15. Click the **Label** field and type the new name for the column. This is the name that will display in the table.

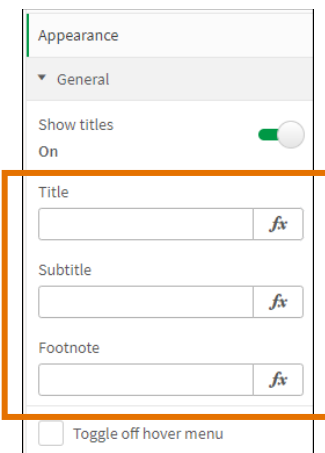


16. Repeat steps 10 – 15 to add more columns as needed.

Add a title, subtitle and/or footnote to your table:

17. In the **Properties** panel, click **Appearance**, then **General**.

18. Type a title, subtitle and/or footnote in the respective fields.



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Change the presentation of your table (e.g., wrap text, fonts, freeze first column):

19. In the **Properties** panel, click **Appearance**, then **Presentation**.
20. Change any of the settings as desired. For example, disable **totals** from displaying in the table or move them to the bottom, type a new title for the **Totals label**, and/or enable **Freeze first column**.

Presentation

Styling

Totals ☒

Auto

Totals label

Totals  *fx*

Horizontal scrolling

Scroll

Freeze first column ☐

Off

Multiline text wrapping

☒ Wrap text in headers

☒ Wrap text in cells

Change any these settings as needed

21. Click **Styling** to open the Styling window.

< Styling

Header font size

13

Header font color

Content font size

13

Content font color

Row height (in lines)

1

Highlight rows on hover ☐

Off

Scrollbar size

Small

Reset all

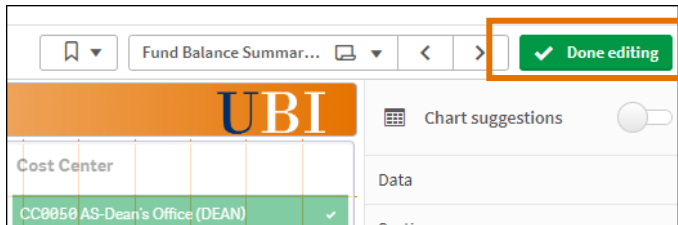
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22. Change any of the styling settings as desired:

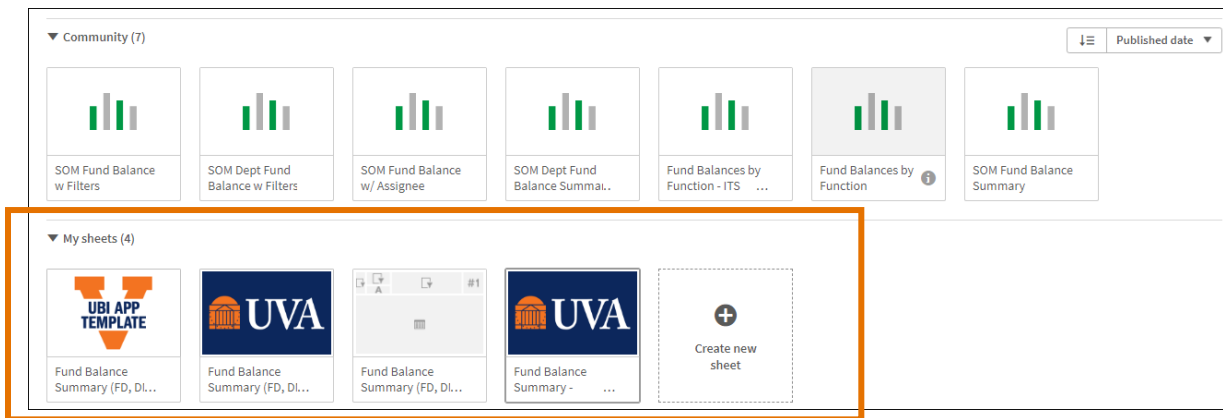
- font size and/or color
- row height
- highlight rows on hover
- scrollbar size

Finish editing the sheet:

23. Click **Done editing** at the top right-hand side of the screen.



24. A **thumbnail icon** for your new My sheet displays in your **My sheets** area for the module.

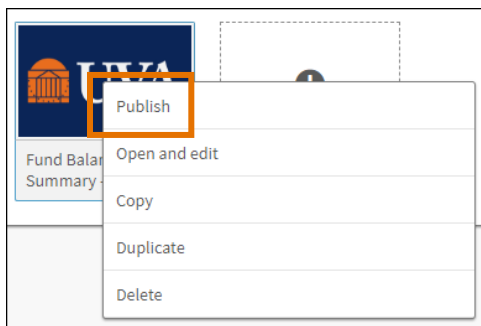


Publish the My sheet:

You can publish your My sheet to share with other users. When you publish a My sheet, it displays under the Community sheets.

25. Under **My sheets**, right-click the My sheet thumbnail.

26. Select **Publish**.



27. Click the **Publish** button.

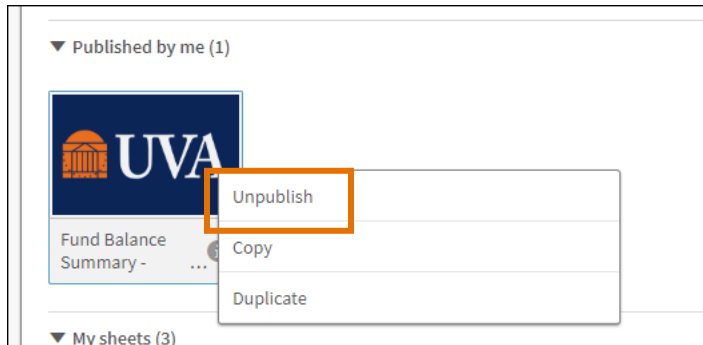
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Unpublish the My sheet:

To remove a published My sheet from the Community sheets, you can unpublish your My sheet. If you need to make additional changes to the My sheet, then you must unpublish it.

28. Under **Published by me**, right-click the My sheet thumbnail.

29. Select **Unpublish**.



30. Click the **Unpublish** button.

Add changes to your My sheet:

31. Open your My sheet.

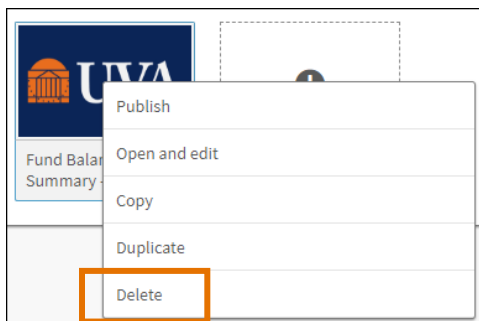
32. Click **Edit sheet** at the top right-hand side of the screen.



Delete the My sheet:

33. Under **My sheets**, right-click the My sheet thumbnail.

34. Select **Delete**.



35. Click the **Delete** button.