# **UVAFinance** UBI

# UBI Analytics – Duplicate, Edit, & Publish My sheets (Finance)

**Quick Reference Guide** 

## 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<sup>™</sup> web browser to access UBI Analytics (Qlik Sense®).

# **Duplicate and Edit My sheet**

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NOTE	

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 Portal	Go to this link: <u>https://ubihub.admin.virginia.edu/</u>
	Search for and select the desired module.
Qlik Sense Hub	Go to this link: <u>https://qsenseprod.admin.virginia.edu/hub/</u>
	Select the Finance stream.
	Select the desired module.

- 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,

Change the Sheet properties:

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

Tuna Batane	e Summary (FD, DN, GF) (1	-)	UD	
	W/MODECCI	Department Level	Cost Center	Sheet properties
& Visitors of the Univ	CH40001 AS-College of Arts & Sciences	CH20394 AS-Administration	CC0050 AS-Dean's Office (DEAN)	Title
	CH48882 AT Intercollegiate Athletics	CH20069 AT Facilities	CC0001 IN-Balance Sheet	nd Balance Summary (FD, DN, GF) (1)
		CH20070 AT-Sports	CC0002 AR-Admissions	
			CC0003 AR-Architectural History	fx
	CH46665 CO-EVP-COO	CH20072 BA-Academic Affairs	CC0004 AR-Architecture	
	CH49096 ED-School of Education & Huma	CH20073 BA-Administrative Services	CC0005 AR-Building Services	Show condition

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.

AsOfPeriod	Fund Balance Type		Compar	ny	VP/MBU	J Level	Depa	irtment Level	Cost	Lenter		Data
Apr-23 🗸	Expendable Fund Balance		UVA_20	7 The Rector & Visitors of the Univ.		1 AS-College of Arts & Sc	ences CH2	394 AS-Administration	c		L -	Sorting
Jun 22	Excluded from Expendable	Fund Balance	ALU_000		CH4080		CH2	3395 AS-Department-Humanities	c			
Jul-22			CM_888				CH2	3399 AS-Program/Center/Institute-S	c			Add-ons
Aug-22	Use the Fund Balance Type to sel and/or "Excluded from Expendab						CH2		CC90	12 AR-Deans Office		Appearance
Sep-22	your needs.	erend datance depending o	DAR BE	0 University of Virginia Darden Sch	CH4038	5 CO-EVP-COO	CH2	1878 AT-Sports	ccee	16 AR-Faculty Research A	ccounts	▶ General
Oct-22			IMG_80			6 ED-School of Education	& HumaCH2		CC00	17 AR-Information Techr	(···)	<ul> <li>Alternate stat</li> </ul>
Oclick to add ti	tle										~~	Presentation
Cost Center	Designated or C	Fund	q	FY Beg Bal	MTD Actuals	YTD Actuals	Current Balance	Commitments	Obligations	Projected Balance with Commitments and Obligations		Tresentation
▲ Totals				(35,303,669.78)	(30,190.95)	(5,956,789.97)	(41,260,459.75)	0.00	(54,770.00)	(41,315,229.75)	0.00	
202020 40 44 444	+ DN000000 AC F8 A	FD005 Unrestricter Sponsored Program Recovery Fund (Sta	n Indirect	(2,040.22)	0.00	0.00	(2,040.22)	0.00	0.00	(2,040.22)	0.00	
		FD005 Unrestricter Sponsored Program Recovery Fund (Sta	d n Indirect	0.00	0.00	699.68	699.68	0.00	0.00	699.68	0.00	
		FD005 Unrestricter Sponsored Program Recovery Fund (Sta	n Indirect	5,324.99	0.00	59,451.13	64,776.12	0.00	17,552.00	82,328.12	0.00	
		FD096 Private Unr	estricted	(57,992.61)	0.00	2,304.28	(55,688.33)	0.00	0.00	(55,688.33)	0.00	
		FD005 Unrestricter Sponsored Program Recovery Fund (Sta	n Indirect	(33,606,459.34)	(30,190.95)	(5,853,261.01)	(39,459,720.35)	0.00	3,695.97	(39,456,024.38)	0.00	
		FD002 Unrestricter Fund	d Local	(6,656.87)	0.00	0.00	(6,656.87)	0.00	0.00	(6,656.87)	0.00	
		FD002 Unrestricter Fund		0.00	0.00	393,451.09	393,451.09	0.00	(76,869.39)	316,581.70	0.00	
		FD096 Private Unre	estricted	(1,604,352.00)	0.00	(559,762.36)	(2,164,114.36)	0.00	851.42	(2,163,262.94)	0.00	
		FD002 Unrestricter Fund	d Local	0.00	0.00	21.23	21.23	0.00	0.00	21.23	0.00	
											₿ (0,5) ::]36 x 13 -	

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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		J	JBI	Chart suggestions		
	Cost C	enter		Data		
	CC000	1 IN-Balance Sheet		Columns		
	CC000	2 AR-Admissions	Сору	Columns		
	CC000	3 AR-Architectural History				
	CC000	4 AR-Architecture	Duplicate			
ces	CC000	15 AR-Building Services	Delete	FIIII		
	CC000	6 AR-Capital Reserve	a **)(···)		·	
				FY Beg Bal	> !!!	
	Obligations	Projected Balance with Commitments and Obligations	Endowment E.	MTD Actuals	>	<ul> <li>Columns</li> </ul>
	428,827,902.08	5,949,673,563.05	6,881,867,	YTD Actuals	>	
	0.00	1,098,858,881.32		Curr Bal	>	
	0.00	5,405,394.98		Commitments	>	

× 1 ×	Use the <b>Undo</b> and I	Redo buttons at the bottom of the screen to undo or redo your last action.
	~ ~	Hide properties

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.

function fx
Fields
% <mark>Function</mark> Dim ID
Function
Function ID
Function Inactive Flag
Function Level 1
Function Level 1 Nome
Add column 🔹

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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.

Data		
Columns		
Cost Center	> III	
Designated or Gift	> III	
Function	~ !!!	
Field		
Function	fx	
Label		
Function	fx	
Include null values		
Limitation		
No limitation	•	
Channes have a life		

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.

Appearance	
<ul> <li>General</li> </ul>	
Show titles On	
Title	fx
Subtitle	fx
Footnote	fx
Toggle off hover menu	

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**.



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	$\bigcirc$
Scrollbar size	
Small	•
Reset all	

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.

Community (7)						Ţ≡	Published of
illi	dh	dh	dh	dh	dh	du	
SOM Fund Balance v Filters	SOM Dept Fund Balance w Filters	SOM Fund Balance w/ Assignee	SOM Dept Fund Balance Summai.	Fund Balances by Function - ITS	Fund Balances by Function	SOM Fund Balance Summary	
My sheets (4)							
UBI APP TEMPLATE	â UVA	G 🔓 🖓 🖓 #1	<b>OVA</b>	G			
-	Fund Balance	Fund Balance	Fund Balance	Create new sheet			

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.

	Publish
Fund Balar	Open and edit
Summary	Сору
	Duplicate
	Delete

27. Click the Publish button.

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.