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.

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

Duplicate and Edit My sheet

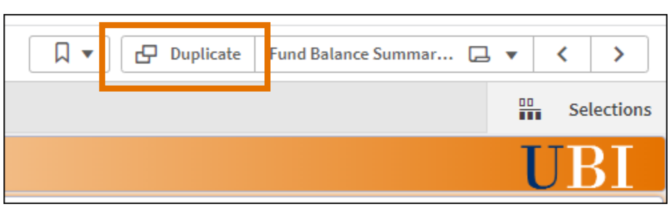
NOTE	For example purposes, the following procedure is based on editing a **straight table** in the *Workday Fund Balances* module, but the same steps can apply to any UBI Analytics module. However, other chart types, such as a pivot table or bar chart have different options available in the Properties 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:

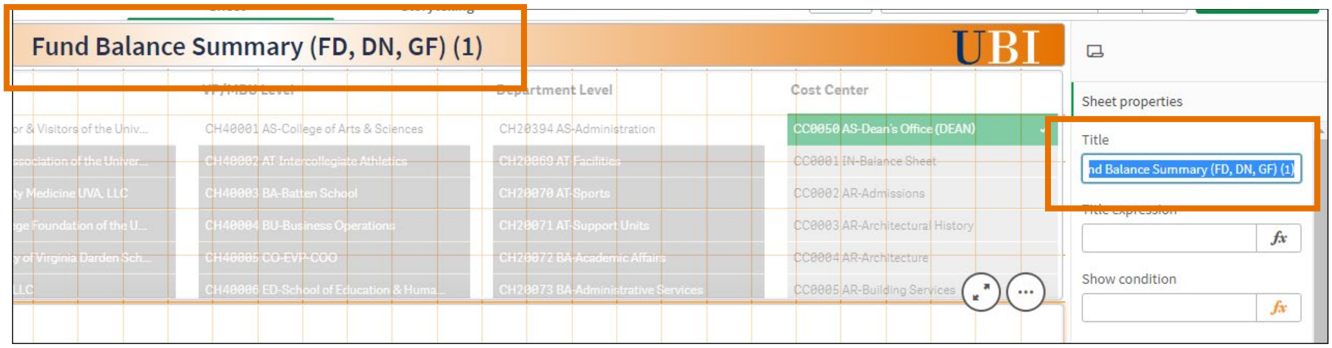
To access by the…	Do this…
UBI Portal	• Go to this link: https://ubihub.admin.virginia.edu/ • Search for and select the desired module.
Qlik Sense Hub	• Go to this link: https://qsenseprod.admin.virginia.edu/hub/ • Select the **Finance** stream. • Select the desired module.

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:

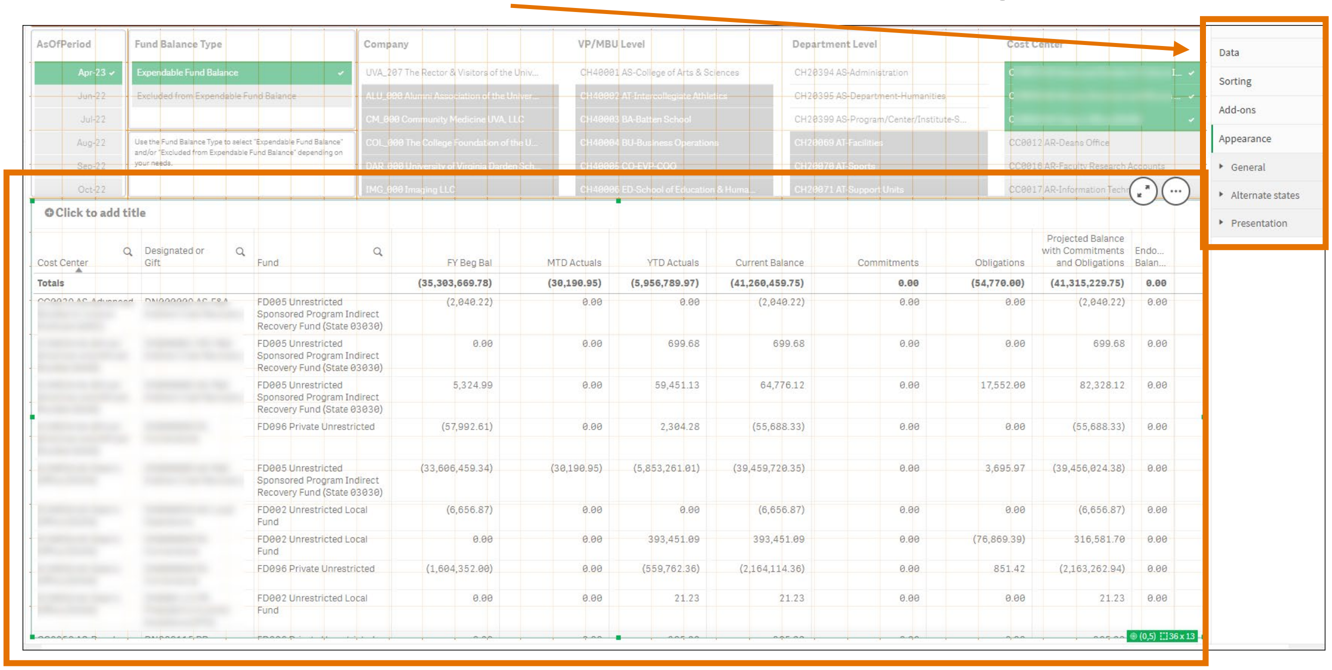
5. In the **Sheet properties**, click in the **Title** field and update the Sheet title.



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.

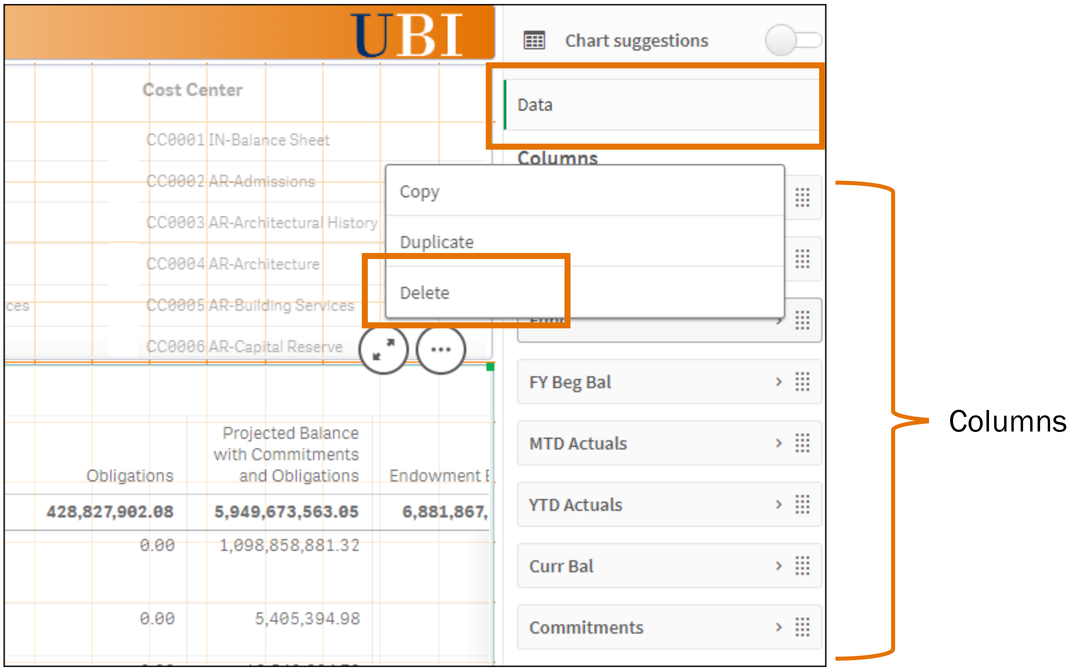
Edit the table visualization:

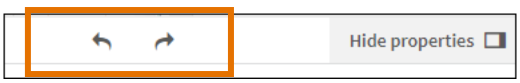
7. Click the table visualization to select it. A “green” box displays around the table to indicate it has been selected and the Properties panel updates for your selection on the right-side of the screen.



Delete a column:

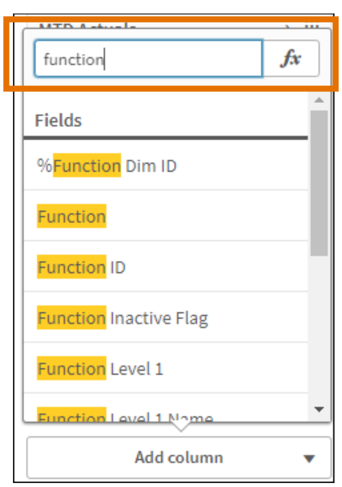
8. In the **Properties** panel, select **Data.**
9. Right-click the column you want to delete and select **Delete.**



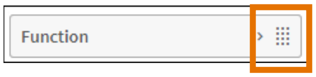
HINT	Use the **Undo** and **Redo** buttons at the bottom of the screen to undo or redo your last action. 

Add a column:

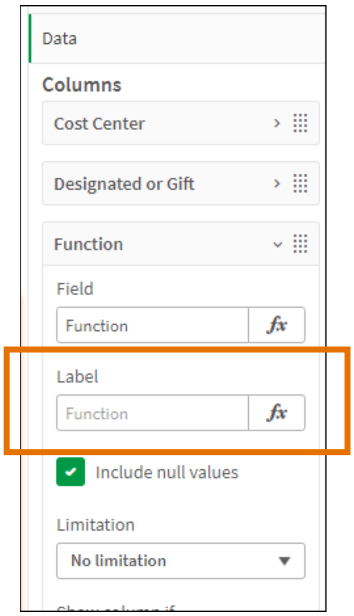
10. In the **Properties** panel, click **Add column.**
11. Select **Dimension** or **Measure** depending on what you want to add to the table.
12. Search for the dimension (e.g., Function) or measure (e.g., FYTD Expenses) and select it from the list.



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.



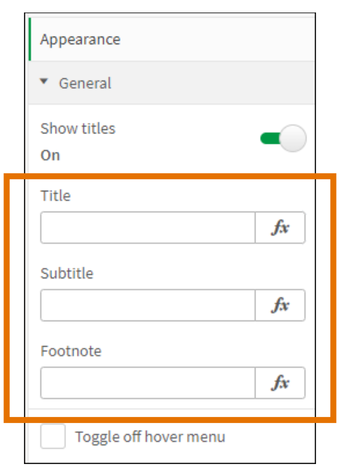
14. Optionally, to change the name of the column, click on the column to expand it.
15. Click the **Label** field and type the new name for the column. This is the name that will display in the table.



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

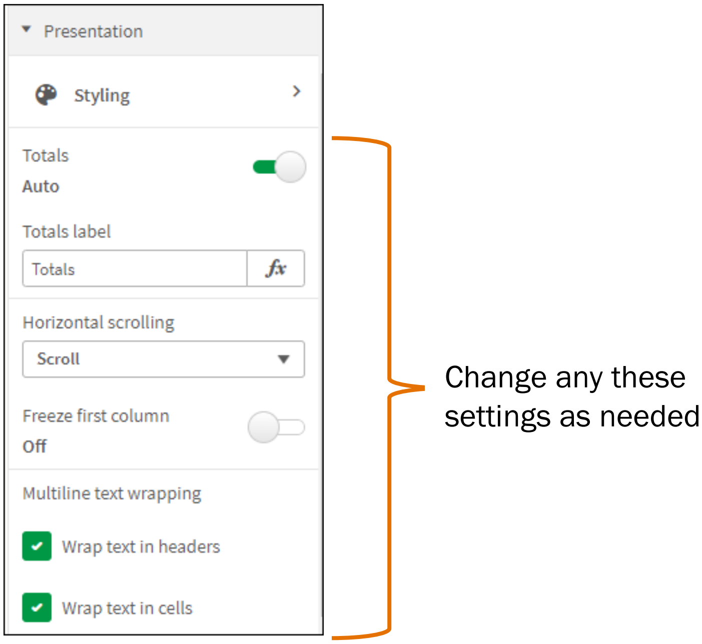
Add a title, subtitle and/or footnote to your table:

17. In the **Properties** panel, click **Appearance**, then **General**.
18. Type a title, subtitle and/or footnote in the respective fields.

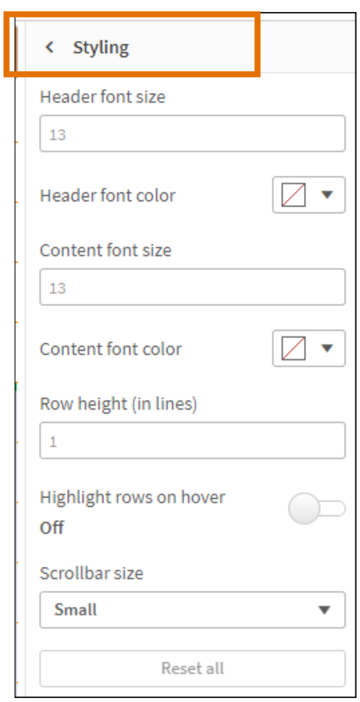


Change the presentation of your table (e.g., wrap text, fonts, freeze first column):

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.**



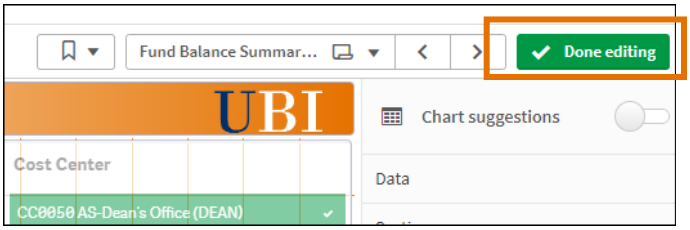
21. Click **Styling** to open the Styling window.



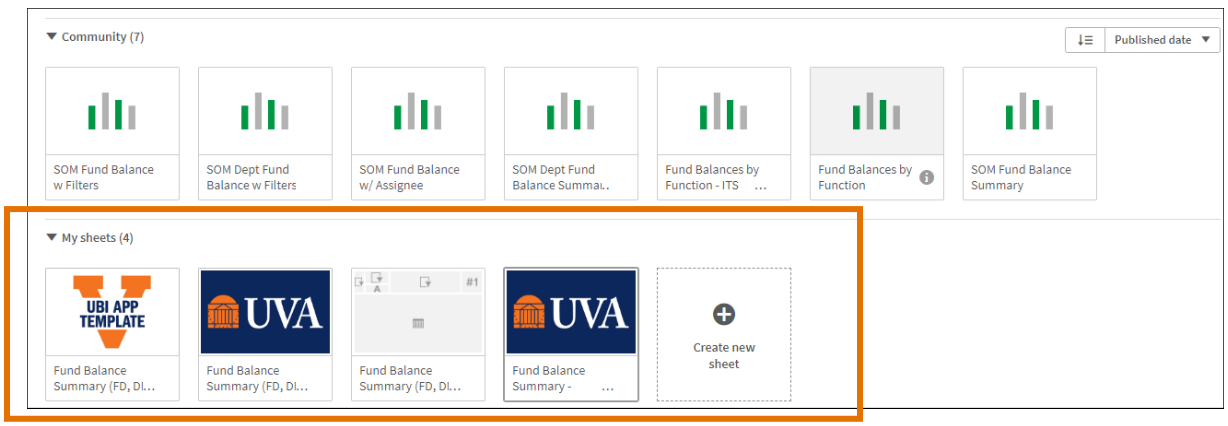
22. Change any of the styling settings as desired:
    - font size and/or color
    - row height
    - highlight rows on hover
    - scrollbar size

Finish editing the sheet:

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



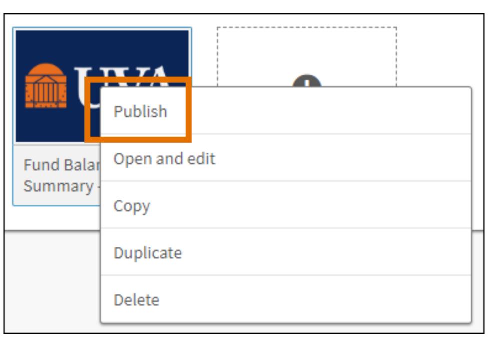
24. A **thumbnail icon** for your new My sheet displays in your **My sheets** area for the module.



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**.

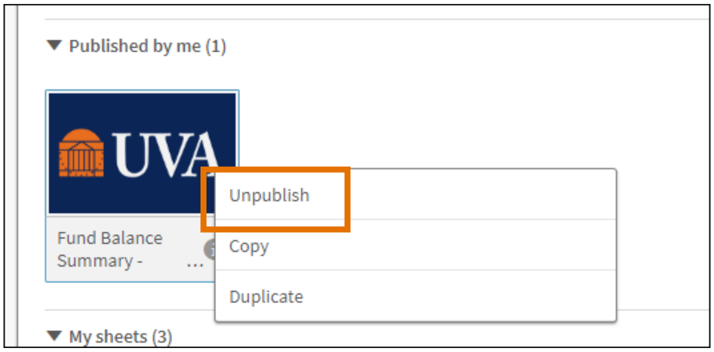


27. Click the **Publish** button.

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.**

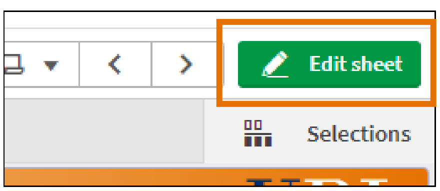


30. Click the **Unpublish** button.

Add changes to your My sheet:

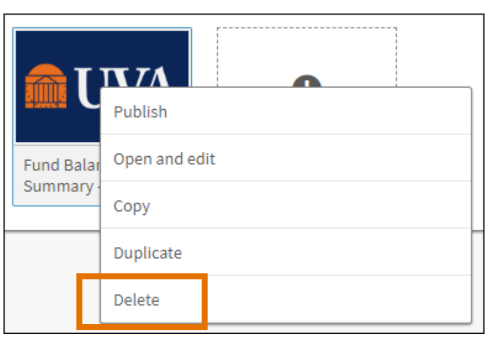
31. Open your My sheet.

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.