## What is the UBI Portal?

The *UBI Portal* (formerly the UBI User Hub) is a centralized location for accessing the UBI applications and modules. From the UBI Portal, you can open *any* app that you have security to access whether it resides on the UBI Reporting (QlikView<sup>®</sup>) or UBI Analytics (Qlik Sense<sup>®</sup>) platform.

From the UBI Portal, you can also view a list of fields that are available for a selected app or search for a specific field to view the app(s) that contain that field. Definitions are included for many of the fields and common terms. Plus, there's a sheet to review general statistics for UBI usage.

# Where do I access it?

Open and bookmark this link: https://ubihub.admin.virginia.edu/

The above link takes you directly to the UBI Apps sheet within the Portal.

|          | You can also access the UBI Portal through the UBI Qlik Sense Hub in the Everyone Stream. |                                      |  |  |  |
|----------|---|--------------------------------------|--|--|--|
|          | ٠   | Open the <u>UBI Qlik Sense Hub</u> . |  |  |  |
|          | ٠   | Select the Everyone Stream.          |  |  |  |
|          | ٠   | Click the UBI Portal thumbnail.      |  |  |  |
| <u> </u> |   |                                      |  |  |  |

# How do I use it?





#### **UBI Apps Sheet**

You search for and launch apps from the *UBI Apps Sheet* from the **App Name** and **Launch App** fields respectively. Initially, the sheet displays all the UBI apps available and sorts by the apps you have access to first and then by alphabetical order.

This sheet provides the following information:

- **Status** indicates the status of the system and apps. Alert messages will display here when applicable. For example, if an app's refresh was delayed, a message will display to alert you of this condition and Delayed will display (instead of On Time).
- My Access Roles lists your UBI access roles. Note, this is for informational purposes only; this is not a filter.
- App Name displays the name of the app. You can search for apps in this field.
- **Do I have access?** indicates if you have the security to access the app (Y or N).
- Launch App provides a link to open the app. The link only displays if you have the security to access the app.
- App Platform indicates the platform for the app; either UBI Analytics (Qlik Sense) or UBI Reporting (QlikView). The User Interface (UI) and navigation is somewhat different for each platform.
- App Owner indicates the owner who maintains the app. App owners can include UBI Central, UVAFinance, or specific schools or units. The app owner determines the method for gaining access to specific apps. See the "About this Page" at the top right of the sheet.
- **Domain(s)** indicates the reporting domain for the app, such as, Finance, Student Records or Student Finance.
- **Description** provides a brief description about the app and its purpose.
- **Required role** indicates the role(s) required to access the specific app. If you need access to an app, you can use this information to request the appropriate role.
- Last Updated indicates the date and time the app was last updated.
- **Reloaded Overnight?** indicates whether the app was reloaded overnight with a check mark. If the app wasn't reloaded, then an "x" displays. Not all apps are scheduled to reload.

### **UBI Portal - Quick Reference Guide**

### Search for and open an app

| Step | Action  |  |  |  |
|------|---|--|--|--|
| 1.   | Select the UBI Apps sheet (if it's not already selected).   |  |  |  |
| 2.   | <ul> <li>From the UBI Apps sheet:</li> <li>In the App Name field, click the Search <sup>Q</sup> icon and enter your search text.</li> </ul>   |  |  |  |
|      | <ul> <li>As needed, add asterisks (wildcards) to each side of your search text to find <i>all</i> selections that contain those characters. This is helpful when you can't remember the exact app name.</li> <li>Image: The select is the second seco</li></ul> |  |  |  |
|      | Use the <b>Domain</b> filter at the top of the sheet to narrow the list of apps to a specific area (e.g., Finance or Student Records).  |  |  |  |
| 3.   | The list of apps updates based on your selections. In the Launch App field, click the link to open the app.           UBI Apps           App Name         Q Do Thave           App Name         Q Do Thave           UBI Apps           Vorkidy Account Certification Dashboard         Y           UBI Analytice         Finance           UBI Central         Review Workday, Account           Uworkday Budget va Actuals         Y           Ubit Arabytice         Finance           UBI Central         Review Workday, EDW A, MRP, Team I EDW, FinBL QA           Workday Budget va Actuals         Y           Ubit Arabytice         Finance           UBI Analytice   |  |  |  |
|      | Links will only display for the apps you have security to access.   |  |  |  |
| 4.   | The app opens in a new tab and is ready for you to use. To return to the UBI Portal, select the UBI Portal tab at the top of your browser window.   |  |  |  |
| 5.   | From the UBI Portal, to clear the current selection and select another app, click the $\otimes$ next to the selection at the top of the sheet, or the Clear all selections button.  |  |  |  |

#### **Find and review data definitions**

The UBI Fields & Definitions sheet allows you to:

- View the fields available in UBI apps.
- View approved definitions for UBI fields as well as other approved terms for understanding data not in UBI apps. Only approved definitions from the UVA Data Catalog display in the UBI Portal. Definitions will continue to be added to the UBI Portal on an on-going basis.

The full data definitions (and in-progress definitions) are stored in the UVA Data Catalog. See the "About this Page" section on this sheet for more information and a link to request access to the Data Catalog.

| Step | Action  |  |   |  |                                     |   |
|------|---|--|---|--|-------------------------------------|---|
| 1.   | From the <i>UBI Apps</i> sheet:<br>Click the <b>Sheets</b> drop-down arrow, then select the <b>UBI Fields &amp; Definitions</b> sheet (or click the<br>Forward Arrow to advance to the next sheet). |  |   |  | <b>initions</b> sheet (or click the |   |
|      | Sheets  Public sheets (5)   | Analyze<br>Sheet ~   | Narrate<br>Storytelling   |  |                                     | Create new sheet  |
|      | About Page<br>▼ My sheets (0)<br>Create new<br>sheet  | UBI Apps   | UBI Fields &<br>Definitions   | UBI App Usage<br>Statistics  | Apps with missing<br>descriptions   |   |
| 2.   | The UBI Field &<br>The table displa<br>updated and wi   | Definitions<br>ays the field,<br>hich UBI app  | sheet display<br>/term, the cor<br>os the field is  | rs.<br>rresponding c<br>included (if a   | lefinition (if a<br>pplicable).     | vailable), when the term was  |
|      | Field/Term  |  | Term Definition   |  | Term Updated                        | UBI App(s)  |
|      | Accounting Date   | In Workday, the Accounting Da<br>accounting date is inherited fro<br>or entered by the initiator of the<br>If a transaction is created in on<br>Accounting Date on the transac<br>transaction is being accounted | te must align with the open fiscal perior<br>m the originating transaction (Expens<br>accounting journal.<br>e month but is not approved and accounce<br>tion will change to the 1st day of the o | od in which the journal posts. The<br>e Report Header, Supplier Invoice)<br>unted during that same month, the<br>open fiscal period in which the | 2023-07-14                          | SEEA Reporting<br>Workster Francisk Reporting<br>Enderal Work-Strucy<br>Workday RAD<br>II PE-scentens.avx<br>Workday RAD Missing PT's |
|      | Accounting Date (WD)  | No approved definition in UVA  | Data Catalog  |  | -                                   | SIS-WD Reconciliation - Finance Version<br>SIS-WD Reconciliation - Full Version<br>SIS-WD Reconciliation - Tmp With Award             |
|      | Accounting Journals   | Accounting journals are manual<br>order to correct transactions pr<br>spend category, revenue category   | I journals that may be used to move fu<br>osted to the wrong account, or for oth<br>ory or to record a transaction.   | nds from one account to another in<br>er reasons such as correcting a  | 2023-07-14                          | The exact field name is not in any UBI applications   |

## **UBI Portal - Quick Reference Guide**

| Step   | Action   |   |  |  |        |
|--|--|---|--|--|--------|
| 3.   | To view available fields in a specific app:  |   |  |  |        |
|  | • In the <b>UBI App</b> field filter, click  | on to search for  | the app.   |  |        |
|  | UBI App<br>UBI App<br>C ira ×<br>IRE Degree Recipients<br>IRE Enrollment<br>IRE Enrollment - Mark Section Access<br>IRE Enrollment Projections Survival<br>IRE Enrollment Projections Survival   |   |  |  |        |
| <ul> <li>Select the app from the search results and click the green check mark.</li> <li>The table updates to list only those fields available for the app selected. The filling the field Marga an Tame Title field filling.</li> </ul> |  |   |  |  | ay     |
|  |  | d filter.   |  |  |        |
|  | About this Page<br>This page shows Fields available in UBI Apps, as well as a glossary of approved data  | UBI Field Filters   | ्, Field Name or Term Title  | ्, Field has Definition ् Term is a UBI Field  |        |
|  | The full data definition of indexistanting and using our of investig data.<br>The full data definitions (terms) are stored in the UVA Data Catalog, which requires specific<br>HSVPN access. Contact the Data Governance Team to learn more, request access, or<br>add/modify a data term. | IRA Enrollment  Top 10 Viz Tricks - Qonn 19 20230601.Retirement Vendor Reconcilia A&S Curriculum Planning | A&S Deans Student Group Desc<br>Acad Interest 1<br>Acad Interest 2<br>Acad Interest Desc 1 | N<br>V   | Y<br>N |
|  | 🕿 Email Data Governance Team   | A&S Department Dashboard<br>A&S Faculty and Student Dashboard   | Acad Interest Desc 2<br>Acad Interest Sequence Num   |  |        |
|  | UBI Fields & Definitions<br>Use UBI Field Filters above; you cannot make selections from the table itself)   |   |  |  |        |
|  | Field/Term Term Defin  | ition   | Term Updated   | UBI App(s)   |        |
|  | A&S Deans Student Group Desc o approved definition in UVA Data Catalog   |   |  | IRA Graduation and Retention Rates<br>OAP IRA Enrollment Summer<br>OAP IRA Enrollment<br>Enrollment<br>IRA Enrollment<br>IRA Course, Grade, Credit Hrs and FIE<br>IRA Course and Esculty |        |
|  | Acad Interest 1 o approved definition in UVA Data Catalog  |   | -  | Enrollment<br>IRA Enrollment<br>IRA Course Agrade. Gredit Hrs and FTE<br>IRA Course and Faculty  |        |
| 4.   | To view the available apps that incl   | lude a specific f   | ield:  |  |        |
|  | In the Field Neme or Term Title  | field filter alial  | the Coords Oi  | ann ta anarch far tha field  |        |
|  | • In the <b>Field Name or Term Title</b> field filter, click the <b>Search</b> Gicon to search for the field.  |   |  |  |        |
|  | Select the field from the search   | n results and cli   | ck the <b>green ch</b>   | eck mark.  |        |
|  | The table updates to show only the selected field(s) and the apps it is available. The available UBI apps also display in the UBI App field filter.  |   |  |  | e      |
|  | About this Page<br>This page shows Fields available in UBI Apps, as well as a glossary of approved data  | UBI Field Filters   | Field Name or Term Title   | Q. Field has Definition Q. Term is a UBI Field   |        |
|  | definitions (terms) for understanding and using our University data.<br>The full data definitions (terms) are stored in the UVA Data Catalog, which requires specific  | Workday Financial Reporting   | Transaction Date 🗸   | Y  | Y      |
|  | HSVPN access. Contact the Data Governance Team to learn more, request access, or<br>add/modify a data term.  | Workday Submail Lines<br>Workday Supplier Invoices  | -2 QTR Avg   | Ň  |        |
|  | 🕿 Email Data Governance Team   | 20230601.Retirement Vendor Reconcilia   | -4 QTR Avg   |  |        |
|  | UBI Fields & Definitions<br>Use UBI Field Filters above; you cannot make selections from the table itself)   | Acto connection reaning   | - Guray  |  | =      |
|  | Field/Term Term Defi   | nition  | Term Updated   | UBI App(s)   |        |
|  | Transaction Date This date is inherited from the Accounting Date from the  | e Accounting Journal Header.  | 2023-07-16   | Workday Journal Lines<br>Workday Financial Reporting<br>Workday Supplier Invoices  |        |
| 5.   | To view only field/terms with a defi   | nition:   |  |  |        |
|  | In the Field has Definition field filte  | r. select Y   |  |  |        |
|  |  | .,  |  |  |        |

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| Step | Action  |   |            |   |
|------|---|---|------------|---|
| 6.   | To only view terms (fields) that are in a UBI app:<br>In the <b>Term is a UBI Field</b> filter, select <b>Y</b> . |   |            |   |
| 7.   | To only view terms not in a UBI app:<br>In the <b>Term is a UBI Field</b> filter, select <b>N</b> .               |   |            |   |
|      | Field/Term Term Definition Term Updated   |   |            |   |
|      | Accounting Journals   | Accounting journals are manual journals that may be used to move funds from one account to another in<br>order to correct transactions posted to the wrong account, or for other reasons such as correcting a<br>spend category, revenue category or to record a transaction. | 2023-07-14 | The exact field name is not in any UBI applications |
|      | Accounting Worktags   | Describes the nature of the transaction to support all financial and management reporting across the<br>enterprise. Examples of Accounting Worktags includes but is not limited to Ledger Account, Spend<br>Category, Revenue Category, Purchase Item, and Expense Item.      | 2023-07-14 | The exact field name is not in any UBI applications |

| NOTE | For additional help navigating the UBI Portal, see the <u>UBI Analytics Quick Reference</u> on the <i>Data</i> & <i>Analytics Community</i> in Microsoft Teams. Team membership is required; click the link to request access or use the steps below.     |  |  |  |  |
|------|---|--|--|--|--|
|      | To join the Data & Analytics Community Team:  |  |  |  |  |
|      | Open Microsoft Teams.   |  |  |  |  |
|      | Click the <b>Teams</b> icon on the left-hand side of the window.  |  |  |  |  |
|      | • Click Join or Create a team (at the very bottom of the screen).   |  |  |  |  |
|      | • In the Join a team with a code box, enter this code: 7g617dn  |  |  |  |  |
|      | If you are a Heath Center or UPG employee, the code will not work. You'll need to email the <u>UBI</u><br><u>Team</u> to request access to the Team. Once you've been granted access, be sure to use your<br>@virginia.edu account to log on to the Team. |  |  |  |  |