

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®) or UBI Analytics (Qlik Sense®) 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.

- Open the [UBI Qlik Sense Hub](#).
- Select the **Everyone** Stream.
- Click the **UBI Portal** thumbnail.

How do I use it?

View info about the sheet & email UBI support

View your access roles

Filter the apps by domain

Check for app/system status

UBI Apps
UBI

About this Page

This page provides a summary of all UBI Apps. To request access to other apps, take note of the App Owner:

- UBI Central: request through Workday System Access Request application. Instructions: <https://in.virginia.edu/request-access>
- School/Department owned: email UBI Support; we will forward your request to the app owner.

[✉ UBI Support Email](#)

You (lcb5t) will be able to launch apps which you are authorized to use.


Your access roles include:
EDW:EDW_A_MRP_Team,
EDW:EDW_P_Finance,
EDW:EDW_Q_Finance

Domain

- Finance
- Human Resources
- Student Records
- Administration
- Admission
- Audit

Status

All overnight reload processes are complete.



ON TIME

App Name	Do I have access?	Launch App	App Platform	Domain(s)	App Owner	Description	Required Role	Last Updated	Reloaded Overnight?
SIS_Class_Scheduling.qvw	Y	Link ↗	UBI Reporting	Student Records	UBI Central	Provides Course and Class Scheduling	EDW_A_MRP_Team EDW_Q_SR_Ltd_Student	07-24-2023 10:35	✓
SIS_Course_Catalog.qvw	Y	Link ↗	UBI Reporting	Student Records	UBI Central	Catalog of courses with course related information such	EDW_A_MRP_Team EDW_UREG_DvIpr	07-24-2023 10:34	✓
Workday Account Certification Dashboard	Y	Link ↗	UBI Analytics	Finance	UBI Central	Used to monitor the status of Account	EDW_A_MRP_Team EDW_FinBI_QA EDW_Q_Finance	07-17-2023 05:19	✗
Workday Budget vs Actuals	Y	Link ↗	UBI Analytics	Finance	UBI Central	Review Workday Actual transactions	EDW_A_MRP_Team EDW_FinBI_QA	07-17-2023 05:38	✗
Workday Employee and CC Lookup	Y	Link ↗	UBI Analytics	Finance Human Resources	VP Finance	Reference app to look up employees by any level of the	EDW_A_MRP_Team EDW_FinBI_QA	07-14-2023 06:08	✗

Search for an app and view your app access

Select a link to open the app in a new tab

View info about the app such as platform, app owner, and description.


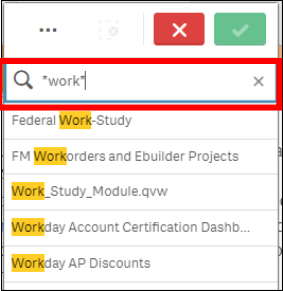

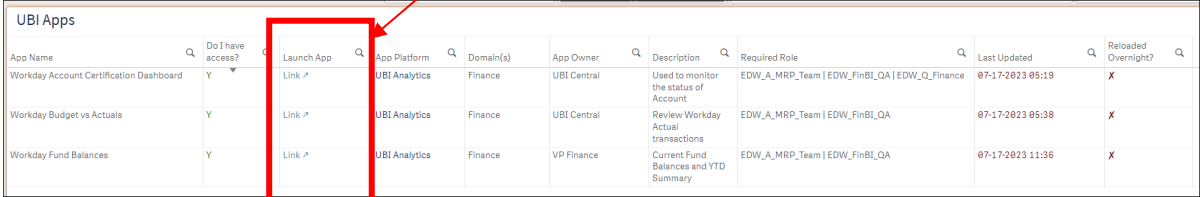




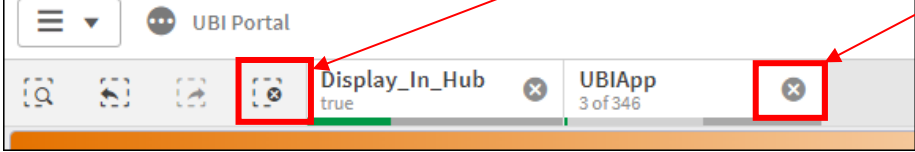
UBI Apps Sheet

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.

Search for and open an app

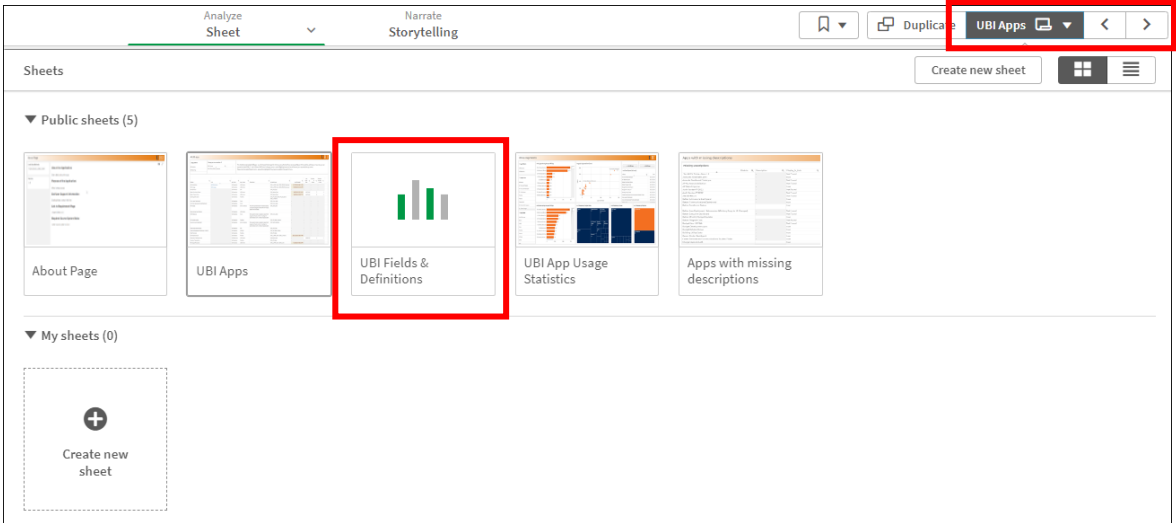
Step	Action
1.	Select the UBI Apps sheet (if it's not already selected).
2.	<p>From the <i>UBI Apps</i> sheet:</p> <ul style="list-style-type: none"> In the App Name field, click the Search  icon and enter your search text. As needed, add asterisks (wildcards) to each side of your search text to find <i>all</i> selections that contain those characters. This is helpful when you can't remember the exact app name.  <ul style="list-style-type: none"> Select the desired app(s), then click the green check mark. <p> HINT Use the Domain filter at the top of the sheet to narrow the list of apps to a specific area (e.g., Finance or Student Records).</p>
3.	<p>The list of apps updates based on your selections.</p> <p>In the Launch App field, click the link to open the app.</p>  <p> NOTE Links will only display for the apps you have security to access.</p>
4.	<p>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.</p> 
5.	<p>From the UBI Portal, to clear the current selection and select another app, click the  next to the selection at the top of the sheet, or the Clear all selections  button.</p> 

Find and review data definitions


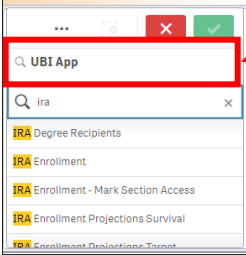
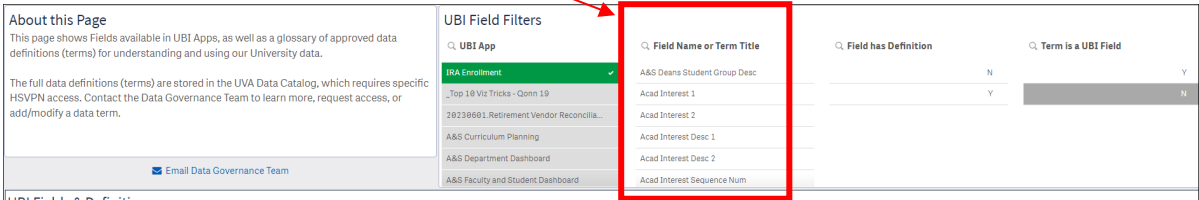

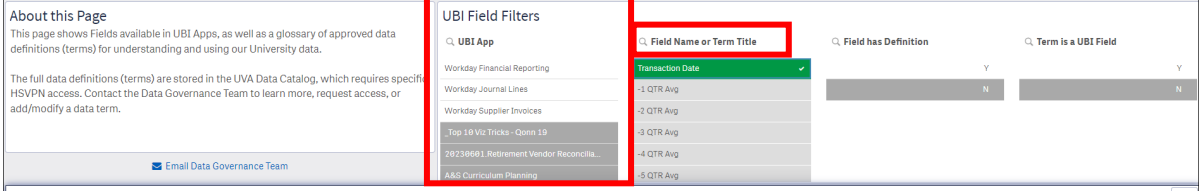
The UBI Fields & Definitions sheet allows you to:

- 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.	<p>From the <i>UBI Apps</i> sheet:</p> <p>Click the Sheets drop-down arrow, then select the UBI Fields & Definitions sheet (or click the Forward Arrow to advance to the next sheet).</p> 																
2.	<p>The UBI Field & Definitions sheet displays.</p> <p>The table displays the field/term, the corresponding definition (if available), when the term was updated and which UBI apps the field is included (if applicable).</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th style="width: 20%;">Field/Term</th> <th style="width: 40%;">Term Definition</th> <th style="width: 15%;">Term Updated</th> <th style="width: 25%;">UBI App(s)</th> </tr> </thead> <tbody> <tr> <td>Accounting Date</td> <td>In Workday, the Accounting Date must align with the open fiscal period in which the journal posts. The accounting date is inherited from the originating transaction (Expense Report Header, Supplier Invoice) or entered by the initiator of the accounting journal. If a transaction is created in one month but is not approved and accounted during that same month, the Accounting Date on the transaction will change to the 1st day of the open fiscal period in which the transaction is being accounted.</td> <td style="text-align: center;">2023-07-14</td> <td>SEFA Reporting Workday Financial Reporting Federal Work Study Workday Supplier Invoices Workday RAD IIP Exceptions.oww Workday RAD Missing PIs</td> </tr> <tr> <td>Accounting Date (WD)</td> <td>No approved definition in UVA Data Catalog</td> <td style="text-align: center;">-</td> <td>SIS-WD Reconciliation - Finance Version SIS-WD Reconciliation - Full Version SIS-WD Reconciliation - Trm With Award</td> </tr> <tr> <td>Accounting Journals</td> <td>Accounting journals are manual journals that may be used to move funds from one account to another in order to correct transactions posted to the wrong account, or for other reasons such as correcting a spend category, revenue category or to record a transaction.</td> <td style="text-align: center;">2023-07-14</td> <td>The exact field name is not in any UBI applications</td> </tr> </tbody> </table>	Field/Term	Term Definition	Term Updated	UBI App(s)	Accounting Date	In Workday, the Accounting Date must align with the open fiscal period in which the journal posts. The accounting date is inherited from the originating transaction (Expense Report Header, Supplier Invoice) or entered by the initiator of the accounting journal. If a transaction is created in one month but is not approved and accounted during that same month, the Accounting Date on the transaction will change to the 1st day of the open fiscal period in which the transaction is being accounted.	2023-07-14	SEFA Reporting Workday Financial Reporting Federal Work Study Workday Supplier Invoices Workday RAD IIP Exceptions.oww Workday RAD Missing PIs	Accounting Date (WD)	No approved definition in UVA Data Catalog	-	SIS-WD Reconciliation - Finance Version SIS-WD Reconciliation - Full Version SIS-WD Reconciliation - Trm With Award	Accounting Journals	Accounting journals are manual journals that may be used to move funds from one account to another in order to correct transactions posted to the wrong account, or for other reasons such as correcting a spend category, revenue category or to record a transaction.	2023-07-14	The exact field name is not in any UBI applications
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UBI Portal - Quick Reference Guide


Step	Action												
3.	<p>To view available fields in a specific app:</p> <ul style="list-style-type: none"> In the UBI App field filter, click the Search  icon to search for the app.  <ul style="list-style-type: none"> Select the app from the search results and click the green check mark. <p>The table updates to list only those fields available for the app selected. The fields also display in the <i>Field Name or Term Title</i> field filter.</p>  <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 20%;">Field/Term</th> <th style="width: 40%;">Term Definition</th> <th style="width: 15%;">Term Updated</th> <th style="width: 25%;">UBI App(s)</th> </tr> </thead> <tbody> <tr> <td>A&S Deans Student Group Desc</td> <td>o approved definition in UVA Data Catalog</td> <td>-</td> <td> IRA Graduation and Retention Rates DAP-IRA Enrollment-Summer DAP-IRA Enrollment-Enrollment IRA Enrollment IRA Course, Grade, Credit Hrs and FTE IRA Course and Faculty </td> </tr> <tr> <td>Acad Interest 1</td> <td>o approved definition in UVA Data Catalog</td> <td>-</td> <td> Enrollment IRA Enrollment IRA Course, Grade, Credit Hrs and FTE IRA Course and Faculty </td> </tr> </tbody> </table>	Field/Term	Term Definition	Term Updated	UBI App(s)	A&S Deans Student Group Desc	o approved definition in UVA Data Catalog	-	IRA Graduation and Retention Rates DAP-IRA Enrollment-Summer DAP-IRA Enrollment-Enrollment IRA Enrollment IRA Course, Grade, Credit Hrs and FTE IRA Course and Faculty	Acad Interest 1	o approved definition in UVA Data Catalog	-	Enrollment IRA Enrollment IRA Course, Grade, Credit Hrs and FTE IRA Course and Faculty
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4.	<p>To view the available apps that include a specific field:</p> <ul style="list-style-type: none"> In the Field Name or Term Title field filter, click the Search  icon to search for the field. Select the field from the search results and click the green check mark. <p>The table updates to show only the selected field(s) and the apps it is available. The available UBI apps also display in the <i>UBI App</i> field filter.</p>  <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 20%;">Field/Term</th> <th style="width: 40%;">Term Definition</th> <th style="width: 15%;">Term Updated</th> <th style="width: 25%;">UBI App(s)</th> </tr> </thead> <tbody> <tr> <td>Transaction Date</td> <td>This date is inherited from the Accounting Date from the Accounting Journal Header.</td> <td>2023-07-16</td> <td> Workday Journal Lines Workday Financial Reporting Workday Supplier Invoices </td> </tr> </tbody> </table>	Field/Term	Term Definition	Term Updated	UBI App(s)	Transaction Date	This date is inherited from the Accounting Date from the Accounting Journal Header.	2023-07-16	Workday Journal Lines Workday Financial Reporting Workday Supplier Invoices				
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5.	<p>To view only field/terms with a definition:</p> <p>In the Field has Definition field filter, select Y.</p>												

UBI Portal - Quick Reference Guide

Step	Action
6.	To only view terms (fields) that are in a UBI app: In the Term is a UBI Field filter, select Y .
7.	To only view terms not in a UBI app: In the Term is a UBI Field filter, select N .

UBI Fields & Definitions
(Use UBI Field Filters above; you cannot make selections from the table itself)

Field/Term	Term Definition	Term Updated	UBI App(s)
Accounting Journals	Accounting journals are manual journals that may be used to move funds from one account to another in order to correct transactions posted to the wrong account, or for other reasons such as correcting a 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 enterprise. Examples of Accounting Worktags includes but is not limited to Ledger Account, Spend 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 [UBI Analytics Quick Reference](#) on the *Data & Analytics Community* 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 **Teams** 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 [UBI Team](#) to request access to the Team. Once you've been granted access, be sure to use your @virginia.edu account to log on to the Team.