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[™] 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 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.

Turia Batarie	e Summary (FD, DN, GF) (-/		
	W////D0 Level	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
	CH40002 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
	CH40005 CO-EVP-COO	CH20072 BA-Academic Affains	CC0004 AR-Architecture	
	CH49986 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			Com	pany	VP/MBI	U Level	Depa	rtment Level	Cost	Canter	\rightarrow	Data
Apr-23 🗸	Exper	ndable Fund Balar	nce		- UVA	207 The Rector & Visitors of the U	niv CH4008	1 AS-College of Arts & So	clences CH20	394 AS-Administration	¢	1 I I	·	Sorting
Jun-22	Exclu	ded from Expend	able Fu	und Balance	ALU_	000 Alumini Association of the Uni	ver	2 AT Intercollegiste Athle	СН28	395-AS-Department-Humanities	c			
Jul-22					CML				CH20	399 AS-Program/Center/Institute-	S C			Add-ons
Aug-22		Fund Balance Type t							ns CH28	069 AT-Facilities	CC00	12 AR-Deans Office		Appearance
Sep-22	and/or your ne	"Excluded from Expenses reds.	ndablei	Fund Balance" depe	inding on	986 University of Virginia Darden	Sch. CH4000	IS CO-EVP-COO	CH20	979 AT-Sports	ccee	16 AR-Faculty Research A	iccounts	▶ General
Oct-22					IMG	800 Imaging LLC	CH4000	6 ED-School of Equcation	& HumaCH28	071 AT Support Units	CC66	17 AR-Information Techr		 Alternate stat
OClick to add ti	itle							•						
												Projected Balance		Presentation
Cost Center	Gift	signated or t	Q	Fund	Q	FY Beg Bal	MTD Actuals	YTD Actuals	Current Balance	Commitments	Obligations	with Commitments and Obligations		
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	
				FD005 Unres	tricted rogram Indirect	(2,040.22)	0.00	0.00	(2,040.22)	0.00	0.00	(2,040.22)	0.00	
				Recovery Fun	nd (State 03030)									
				FD005 Unres Sponsored Pr Recovery Fun	stricted rogram Indirect nd (State 03030)	0.00	0.00	699.68	699.68	0.00	0.00	699.68	0.00	
				FD005 Unres Sponsored Pi		5,324.99	0.00	59,451.13	64,776.12	0.00	17,552.00	82,328.12	0.00	
					e Unrestricted	(57,992.61)	0.00	2,304.28	(55,688.33)	0.00	0.00	(55,688.33)	0.00	1
					stricted rogram Indirect nd (State 03030)	(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 Unres Fund	stricted Local	(6,656.87)	0.00	0.00	(6,656.87)	0.00	0.00	(6,656.87)	0.00	
				FD002 Unres Fund	stricted Local	0.00	0.00	393,451.09	393,451.09	0.00	(76,869.39)	316,581.70	0.00	
				FD096 Privat	e Unrestricted	(1,604,352.00)	0.00	(559,762.36)	(2,164,114.36)	0.00	851.42	(2,163,262.94)	0.00	
				FD002 Unres Fund	tricted Local	0.00	0.00	21.23	21.23	0.00	0.00	21.23	0.00	

Delete a column:

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

UBI Analytics – Duplicate, Edit & Publish My sheets (Finance) – Quick Reference Guide

		J	JBI	Chart suggestions		
	Cost (Center		Data		
	CC006	31 IN-Balance Sheet		Columns		
	CC006	32 AR-Admissions	Сору	Columns		
	CC006	3 AR-Architectural History				
	CC006	04 AR-Architecture	Duplicate			
ces	cceee	35 AR-Building Services	Delete	FIIII		
	CC006	06 AR-Capital Reserve	" *)()			
				FY Beg Bal	> !!!	
	Obligations	Projected Balance with Commitments and Obligations	Endowment I	MTD Actuals	> III	Columns
	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	>	

	Use the U I	ndo and Redo buttons at the top of the screen to undo or redo your last action.
	\langle	□ Bookmarks ∨ □ Sheets ∨ ✓ Done editing

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	•	
Ohann an Ivana if		

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

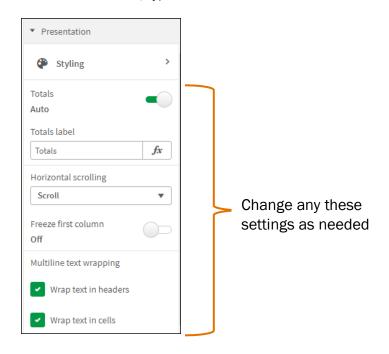
Add a title, subtitle and/or footnote to your table:

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

Appearance	
 General 	
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. The General tab is selected by default.

Change any of the settings as desired:

- font size, style and/or color of table titles
- font size, style and/or color of footnote
- background color of table
- add a background image
- border color
- border corner radius
- border shadow

	eset all
General Chart	
Title	\otimes
QlikView Sans, sans-serif	~
B / U 15px ~	-
Subtitle	\otimes
QlikView Sans, sans-serif	~
B / ⊻ 12px ~	~
Footnote	\otimes
QlikView Sans, sans-serif	~
B / U 12px ~	-
Background color	\otimes
Single color v	~
Background image	\otimes
None	~
Border	\otimes
Outline	
1px v	~
Corner radius	
4px	~
Shadow	\otimes

UBI Analytics - Duplicate, Edit & Publish My sheets (Finance) - Quick Reference Guide

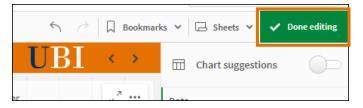
22. Select the Chart tab and change any of the chart style settings as desired:

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

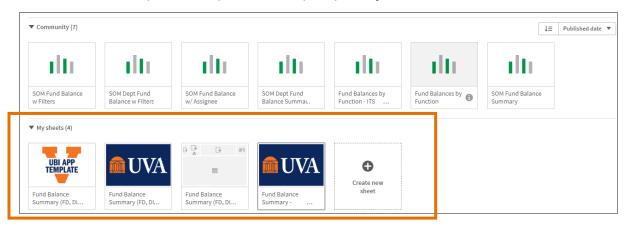


Finish editing the sheet:

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.



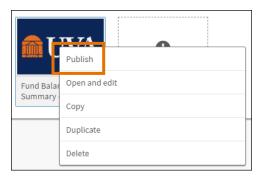
UBI Analytics - Duplicate, Edit & Publish My sheets (Finance) - Quick Reference Guide

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.

	ľ	TTA Publish	
Fund Ba Summa		Open and ed Copy	it
		Duplicate	
		Delete	

35. Click the Delete button.