

**Content Links**

**Overview** ..... **1**  
     Introduction ..... **1**  
     Resources ..... **1**  
**Bookmarks** ..... **2**  
     Create a Bookmark ..... **2**  
     Select a Bookmark ..... **4**  
     Edit, Update, or Delete a Bookmark and Copy the Selections ..... **5**  
     Share Bookmarks ..... **7**

**Overview**

**Introduction**

A bookmark saves your filter selections in an app/module, so the next time you want to retrieve those same filters, you can simply select your bookmark. It is highly recommended you create bookmarks for your most commonly selected filters. Bookmarks are easy to create and save you time.

A bookmark can be created to:


- save your selections only (and apply them to any sheet)
- save your selections and take you directly to a specific sheet in an app/module.

A bookmark also provides you the ability to save any layout changes such as, moved columns.

**Resources**

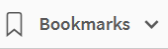
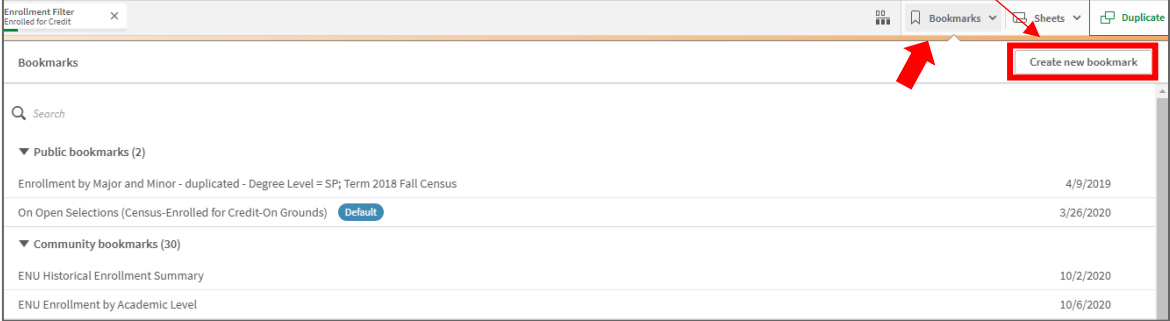
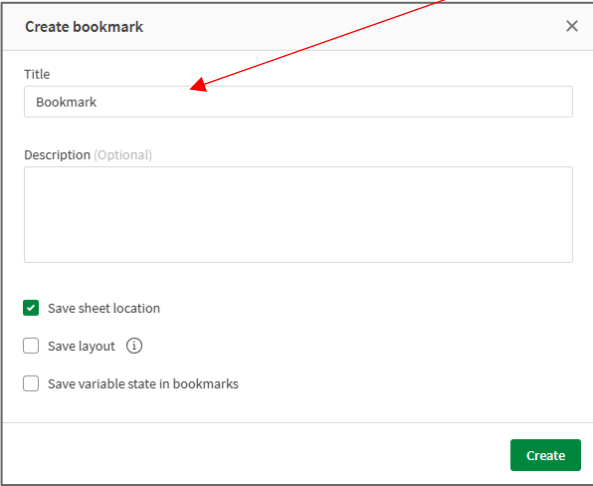
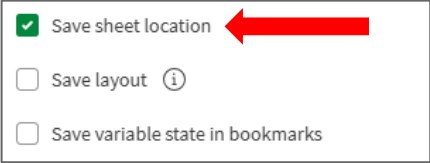
Check the links below for more information about using bookmarks in UBI Analytics (Qlik Sense®).

- [Create a “favorites” list in the UBI Portal](#)
- [Creating Bookmarks - Qlik Help](#)









 <p><b>NOTE</b></p>	<p>For best results, it is recommended that you use Chrome™ to access UBI Analytics apps.</p>
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## Bookmarks

### Create a Bookmark

Step	Action
1.	Select the filters you want to save in your bookmark. If you want your bookmark to also take you to a specific sheet, then go to that sheet as well.
2.	<p>Click the <b>Bookmarks</b>  button, then click <b>Create new bookmark</b>.</p> 
3.	<p>Type a name for your bookmark in the <b>Title</b> field. Optionally, add a description.</p> 
4.	<p>The sheet location is saved by default. If you only want to save your selections and not have your bookmark be associated with the specific sheet, then clear this option.</p> 

## Quick Reference Guide – Bookmarking in UBI Analytics

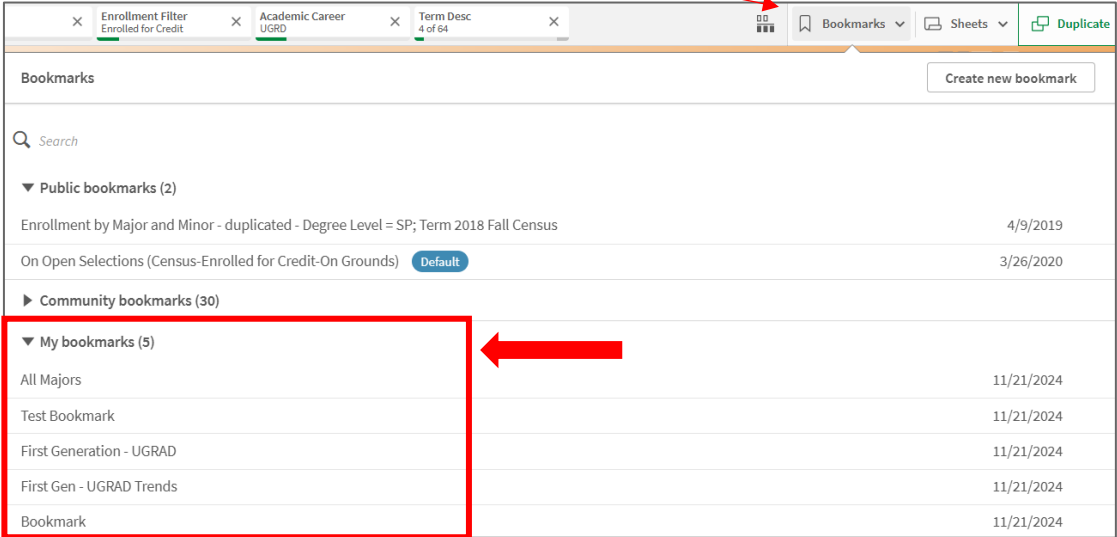
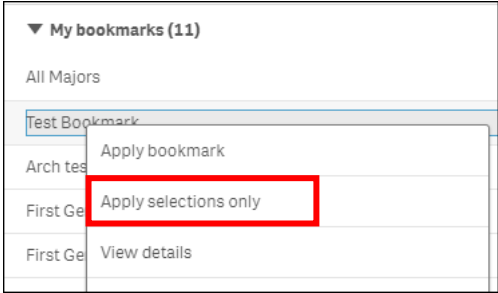
Step	Action
5.	<p>If you've made any changes to the layout of the sheet, such as moving column locations and you want to preserve these changes in your bookmark, then select the <b>Save layout</b> option. Otherwise, leave this option as is (unselected).</p> <div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"> <input checked="" type="checkbox"/> Save sheet location  <input checked="" type="checkbox"/> Save layout ⓘ   <input type="checkbox"/> Save variable state in bookmarks         </div>
6.	<p>If you have a specific variable state that you want to save within your bookmark, like a <b>Minimum Student Count Size</b>, then select the <b>Save variable state in bookmarks</b> option. Otherwise, leave this option as is (unselected). This formatting option will apply more often to student and enrollment information.</p> <div style="display: flex; justify-content: space-around;"> <div style="border: 1px solid #ccc; padding: 5px; width: 30%;"> <p><b>Enter a Minimum Student Count Size</b>            This applies to the table below. Actual counts will be displayed when they are greater than the Minimum Count</p> <input type="text" value="0"/>  <small>*FERPA Guidance is to show actual counts &gt; 9 Students</small> </div> <div style="border: 1px solid #ccc; padding: 5px; width: 30%;"> <input checked="" type="checkbox"/> Save sheet location  <input type="checkbox"/> Save layout ⓘ  <input checked="" type="checkbox"/> Save variable state in bookmarks  </div> </div>
7.	<p>When you're finished selecting your formatting options, click <b>Create</b>.</p> <div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <p><b>Create bookmark</b> <span style="float: right;">×</span></p> <p>Title  <input type="text" value="Bookmark"/></p> <p>Description (Optional)  <input style="height: 40px;" type="text"/></p> <p><input checked="" type="checkbox"/> Save sheet location  <input type="checkbox"/> Save layout ⓘ  <input type="checkbox"/> Save variable state in bookmarks</p> <p style="text-align: right;"><b>Create</b></p> </div>  </div>
8.	<p>Click the green checkmark  or simply click outside the Bookmarks window. Your bookmark is added to your bookmarks list.</p> <div style="display: flex; align-items: flex-start;"> <div style="border: 1px solid #ccc; padding: 5px; width: 60%;"> <p>Title  <input type="text" value="Bookmark"/></p> <p>Description  <input style="height: 40px;" type="text"/></p> <p style="font-size: small;">Location: Major Counts (Duplicated - Full Detail) by Most Used Variables            Layout state: None            Variable state: Saved</p> </div> <div style="margin-left: 20px; text-align: right;">  <div style="display: flex; flex-direction: column; align-items: center;">    </div> </div> </div>

## Quick Reference Guide – Bookmarking in UBI Analytics

### Select a Bookmark

You can select a bookmark to:

- apply the selections in the bookmark and jump to the sheet where the bookmark was created
- only apply the selections from a bookmark to your currently selected sheet

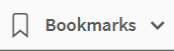



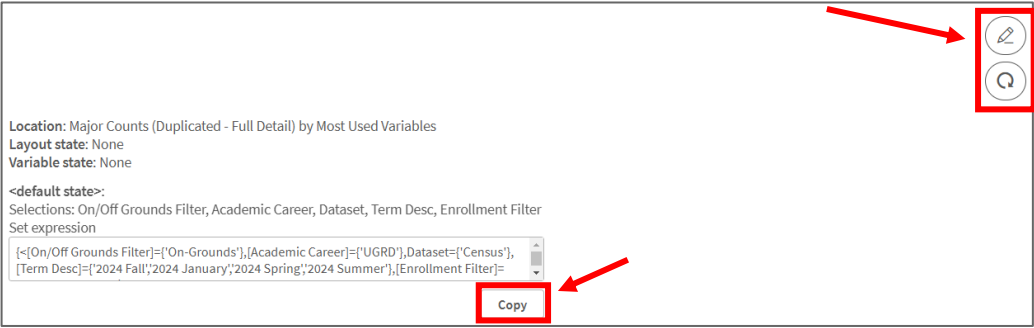
Step	Action																				
1.	<p>To select your bookmark, click the <b>Bookmarks</b> button and then select the bookmark.</p>  <table border="1"><thead><tr><th>Public bookmarks (2)</th><th></th></tr></thead><tbody><tr><td>Enrollment by Major and Minor - duplicated - Degree Level = SP; Term 2018 Fall Census</td><td>4/9/2019</td></tr><tr><td>On Open Selections (Census-Enrolled for Credit-On Grounds) <b>Default</b></td><td>3/26/2020</td></tr></tbody></table> <table border="1"><thead><tr><th>Community bookmarks (30)</th><th></th></tr></thead><tbody><tr><td><b>My bookmarks (5)</b></td><td></td></tr><tr><td>All Majors</td><td>11/21/2024</td></tr><tr><td>Test Bookmark</td><td>11/21/2024</td></tr><tr><td>First Generation - UGRAD</td><td>11/21/2024</td></tr><tr><td>First Gen - UGRAD Trends</td><td>11/21/2024</td></tr><tr><td>Bookmark</td><td>11/21/2024</td></tr></tbody></table> <p><b>NOTE</b> Not all modules will include Public and/or Community bookmarks like seen in the graphic above.</p>	Public bookmarks (2)		Enrollment by Major and Minor - duplicated - Degree Level = SP; Term 2018 Fall Census	4/9/2019	On Open Selections (Census-Enrolled for Credit-On Grounds) <b>Default</b>	3/26/2020	Community bookmarks (30)		<b>My bookmarks (5)</b>		All Majors	11/21/2024	Test Bookmark	11/21/2024	First Generation - UGRAD	11/21/2024	First Gen - UGRAD Trends	11/21/2024	Bookmark	11/21/2024
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First Generation - UGRAD	11/21/2024																				
First Gen - UGRAD Trends	11/21/2024																				
Bookmark	11/21/2024																				
2.	<p>To only apply your bookmark <i>selections</i> to a sheet, click the <b>Bookmarks</b> button, then <b>right-click</b> the bookmark and select <b>Apply selections only</b>.</p>  <p>This will apply the selections from the bookmark to the <i>currently selected</i> sheet. That is, if the bookmark was set up to jump directly to another sheet, it will not take you to that sheet.</p>																				

## Quick Reference Guide – Bookmarking in UBI Analytics




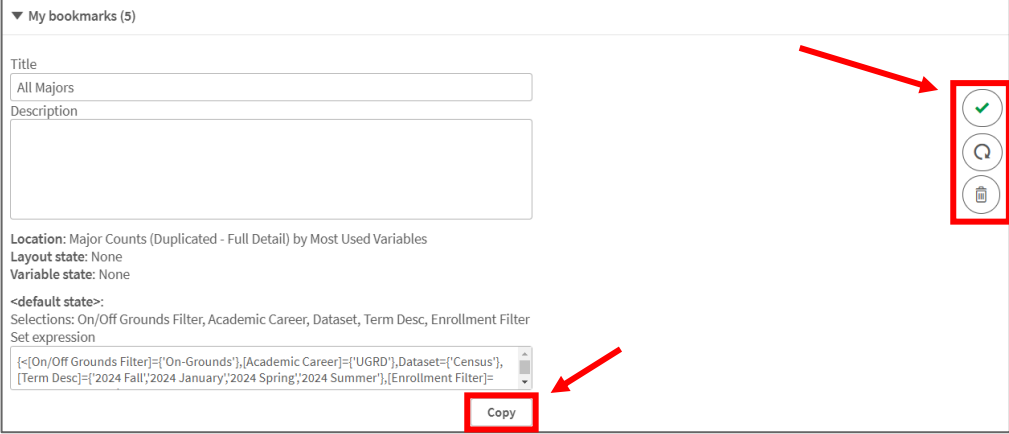
### Edit, Update, or Delete a Bookmark and Copy the Selections

You can edit the title and description of a bookmark, update an existing bookmark with the new current selections, and delete a bookmark you've previously created.

You can also copy the selections in your bookmark and paste them into an email or document (e.g., export to Excel file). This is especially helpful when sharing a report via an exported Excel spreadsheet or a link with someone to let them know what selections were used to produce the data in the report.

Step	Action
1.	Click the <b>Bookmarks</b>  button to open the list of bookmarks.
2.	Hover your mouse over the Bookmark and click the <b>Details</b> icon. 
3.	Do any of the following: <ul style="list-style-type: none"><li>Click the <b>Edit</b>  button to be able to edit the bookmark title and description.</li><li>Click the <b>Update</b>  button to update the bookmark with the new current selections in the <b>Selections Toolbar</b> at the moment of update.</li><li>Click <b>Copy</b> to copy the saved bookmark selections and then paste them in an email or file (e.g., the export of a report to Excel).</li></ul> 



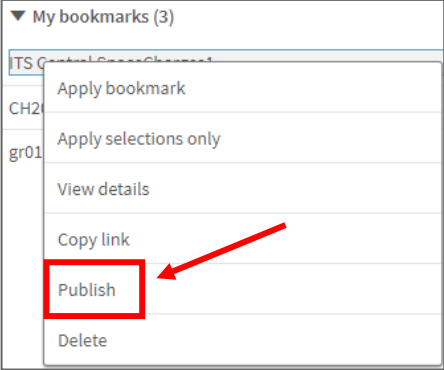
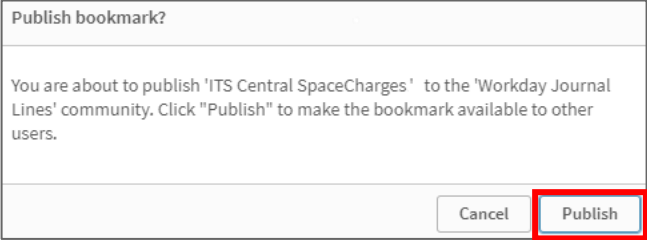

## Quick Reference Guide – Bookmarking in UBI Analytics

Step	Action
4.	<p>Once in <b>Edit</b> mode, do any of the following:</p> <ul style="list-style-type: none"><li>• Update the <b>Title</b>.</li><li>• Update the <b>Description</b>.</li><li>• Click the <b>Update</b>  button to update the Bookmark.</li><li>• Click the <b>Delete</b>  button to delete the bookmark.</li><li>• Click <b>Copy</b> to copy the saved bookmark selections and then paste them in an email or file (e.g., the export of a report to Excel).</li><li>• When finished editing, click the <b>Stop Editing</b>  button to save the changes and close it.</li></ul> 

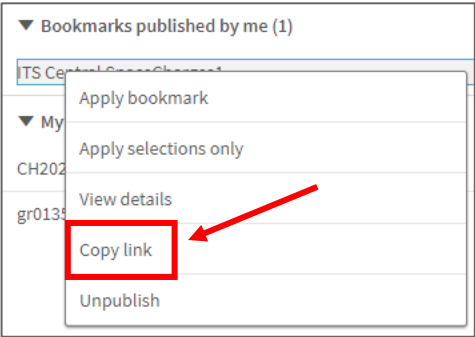
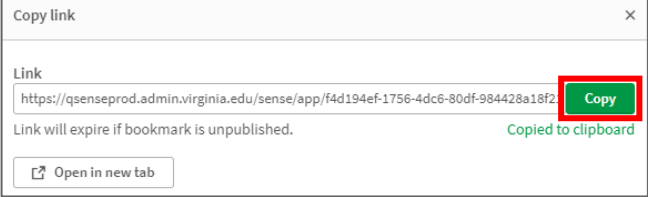
## Quick Reference Guide – Bookmarking in UBI Analytics

### Share Bookmarks

You can share your bookmarks by publishing them. When you publish a bookmark, it will display under “Community bookmarks” and can be used by others with access to the app/module. You can also copy the bookmark link and share it with other users once it has been published.

Step	Action
1.	Click the <b>Bookmarks</b>  <b>Bookmarks</b>  button to open the list of bookmarks.
2.	Under <b>My bookmarks</b> , right-click the bookmark you want to publish and select <b>Publish</b> . 
3.	Click <b>Publish</b> on the prompt box that displays. 
4.	The bookmark now displays under the <b>Community bookmarks</b> and can be used by other users. 

## Quick Reference Guide – Bookmarking in UBI Analytics

Step	Action
5.	<p>Now that the bookmark has been published, you can also copy the link. Right-click the published bookmark and select <b>Copy link</b>.</p> 
6.	<p>Click <b>Copy</b> on the prompt box that displays.</p> 
7.	<p>Paste (Ctrl+v) the link into an e-mail (or other location) to share it with other users.</p>