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Change Log

<table>
<thead>
<tr>
<th>Description of Change</th>
<th>Resource</th>
<th>Date of Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update with comments from Robert Flum</td>
<td>Cati Cederoth</td>
<td>12/31/2017</td>
</tr>
<tr>
<td>Future updates: Add basic navigation, search and open</td>
<td>TBD</td>
<td></td>
</tr>
</tbody>
</table>
Signing into UWBI

To Sign into UWBI:
1. In the address field of a browser, enter the URL https://uwbi.wisconsin.edu/analytics
2. Authenticate local organization by selecting a campus from the Select Organization dropdown, then select Go
3. The Login page appears. Enter NetID and Password, then select Login
4. The Additional Login Required screen appears requiring a One-Time Password
5. Enter a One-Time Password with a fob or the VIP Access App on a cellphone (available on Apple and Android devices)
6. Select Continue
7. After signing in, the user is directed to a Landing Page. The Landing Page populates links in the form of tiles (highlighted red). The tiles are comprised of campuses the user has access to, e.g., Eau Claire or HR/Finance. The example figure below will not look like the user’s Landing Page due to different levels of access.

8. Once a tile has been selected, the user is directed to the tile’s homepage.

**Signing Out of UWBI**

To sign out of UWBI:
1. In the Global Header, select Sign Out
2. Close out of the browser

**Note:** Sign out before closing the browser, do not close the browser to sign out.

**Setting Preferences**

To set preferences:
1. In the Global Header select the dropdown arrow by Signed in as Username
2. Select My Account
3. Make desired changes
4. Select OK
Global Header

The Global Header will always display in the top right of any screen while in UWBI. Note that options listed will vary depending on the privileges the user has. For example, a consumer will not see the “New” option.

- **Search** — Enables users to search the catalog
- **Advanced** — Displays the Catalog Page in search mode
- **Help** — Displays Home Help and Help Contents
- **Sign Out** — Signs out of UWBI
- **Home** — Displays the Home Page
- **Catalog** — Displays the Catalog Page
- **Favorites** — Displays favorite objects and categories
- **Dashboards** — Contains links to all dashboards
- **New** — Displays a list of objects. To create an object, select it from the list
- **Open** — Use to open objects
Favorites

The use of the Favorites functionality (from the global header) is a useful way for every user to customize their experience. Saving a Favorite allows users to navigate to a certain dashboard and tab with a shortcut.

To save a Favorite:
1. Navigate to desired dashboard and tab
2. Select the Favorites dropdown from the Global Header
3. Select Add to Favorites

To view Favorites:
1. After a Favorite has been saved, a list of Favorites will appear under the Favorites dropdown in the Global Header

To manage Favorites:
- Select Manage Favorites
  - Here users can:
    - Create more organization by making Categories
      - To create a Category:
        - Select New Category (highlighted red in figure below)
        - Title the Category
        - Select OK
        - Select a Favorite to add to the Category
        - Select the Copy icon (highlighted blue)
        - Select the Category, and select the Paste icon (highlighted yellow)
        - To view Category contents, double click on the Category
        - To return to the Favorites list, click on Favorites
        - Once an item is in a Category, delete it from the Favorites list. Select the Favorite, and select the Remove icon (highlighted orange)
    - Rename a Category
- To rename a **Category**:
  - select the **Category**
  - Select the **Rename** icon (highlighted green)
  - Rename
  - Select **OK**
- Remove a **Favorite** or **Category**
  - To remove an item:
    - Select the item, and select the **Remove** icon (highlighted orange)
- Sort **Favorites** and **Categories**
  - To sort items
    - Select the **Sort** icon (highlighted purple) and select desired option (A-Z or Z-A)
  - When done with modifications, select **OK**

![Manage Favorites](image)