JANUARY 1, 2018

University of Wisconsin Business Intelligence

QUICK START GUIDE

Contents

Change Log

Description of Change	Resource	Date of Change
Update with comments from Robert Flum	Cati Cederoth	12/31/2017
Future updates: Add basic navigation, search and open	TBD	

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
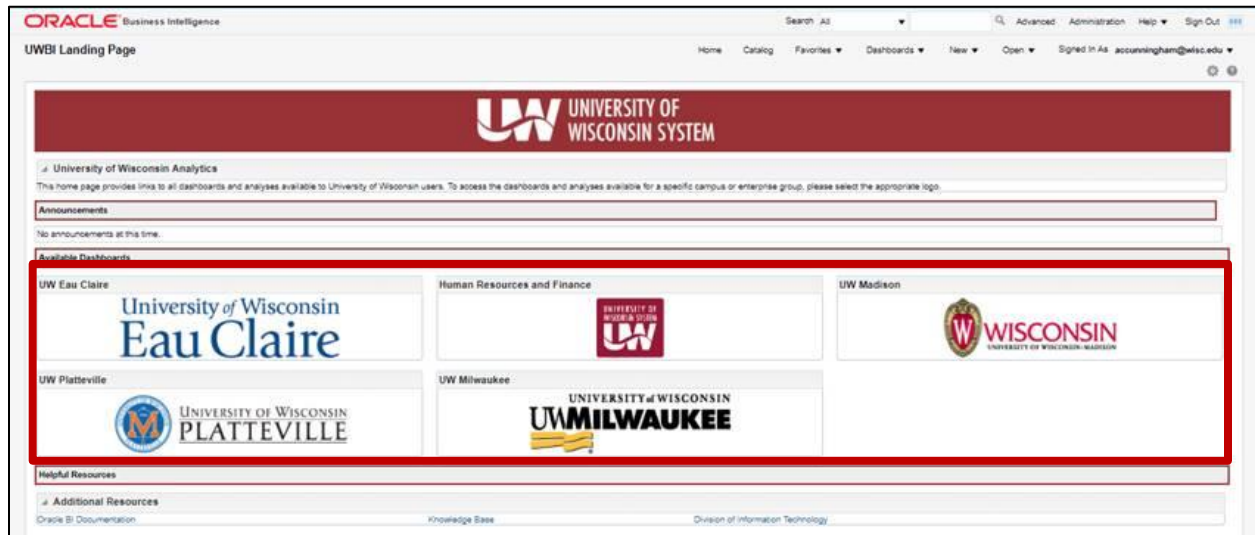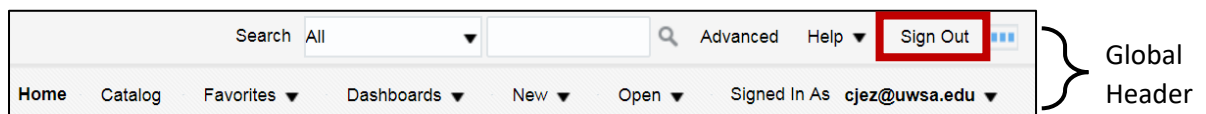

8. Once a tile has been selected, the user is directed to the tile's homepage

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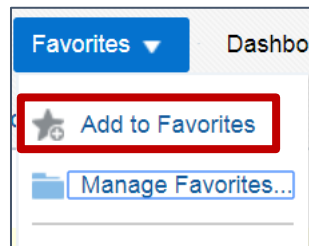
To view **Favorites**:
1. After a **Favorite** has been saved, a list of **Favorites** will appear under the **Favorites** dropdown in the **Global Header**

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**