UW BUSINESS INTELLIGENCE

QUICK GUIDE: Creating and Managing Favorites
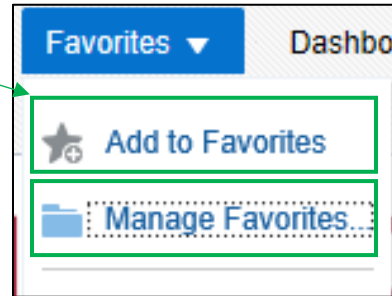
Saving a Favorite

1. Go to UWBI PROD: https://uwbi.wisconsin.edu
2. Navigate to the desired dashboard and tab
3. Select the Favorites dropdown from the Header:
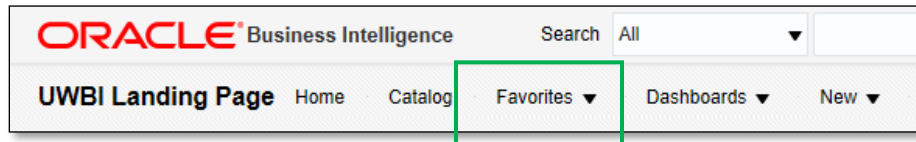
4. Select Add to Favorites

Viewing Favorites

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

Managing Favorites (Create a Category, Rename, and Remove)

1. Select Manage Favorites to create a category.
2. Select New Category (highlighted red in figure in the next column)
3. Title the Category
4. Select OK
5. Select a Favorite to add to the Category
6. Select the Copy Icon (highlighted black in the next column)
7. Select the Category and select the Paste Icon. To view the Category contents, double click on the Category
8. To return to the Favorites list, click on Favorites
9. Once an item is in a Category, delete it from the Favorites list. Select the Favorite, and select the Remove icon (highlighted green in the next column)
10. To rename a Category, select the Rename Icon (highlighted in blue below)
11. Rename and select OK

12. To remove an item, select the item, and select the Remove icon (highlighted in green below)
13. To sort items, select the Sort Icon (highlighted in purple below) and select the desired option (A-Z or Z-A)
14. When done, select OK