# UW BUSINESS INTELLIGENCE

QUICK GUIDE: Saving a Customized Dashboard

*Saving a dashboard after you have altered the prompts and filters*

Saved customizations allow users to save and view dashboard pages in their current state with their most frequently used or favorite choices for items such as filters, prompts, column sorts, drills in analyses, and section expansion and collapse.

1. Go to UWBI PROD: https://uwbi.wisconsin.edu
2. Navigate to the desired dashboard and tab
3. Drill down in your filters and Prompts
   a. You must click continue and let the report run
   b. Here you can delete and add columns as desired
   c. **NOTE:** You cannot access the *Save Current Customizations* until the report has run
4. You can save your customized dashboard by going to page options under your username in the far upper right-hand corner→ Save current customizations → Enter the name of customization → Click OK.
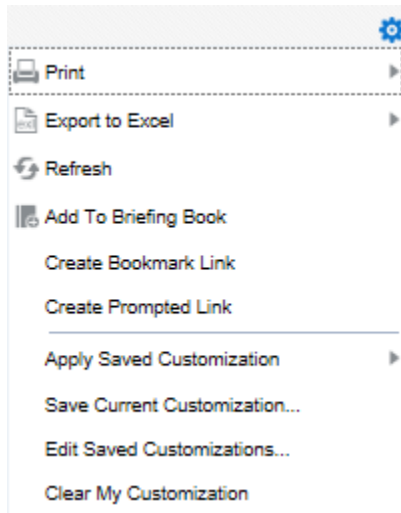
5. To apply customization to a dashboard page, go to page option → Apply saved customization → Select name → Click OK.

a. Check the box to *Make this my default for this page*:
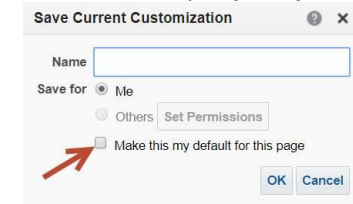
b. This will make it the customization open when visiting this page again.
c. **NOTE:** You will not need to complete step 8 since the page will just open with the saved settings.
6. It allows you to save and view dashboard pages in their current state such as filters, prompts, column sorts, drills in analyses, and section expansion and collapse.
7. By saving customizations, you do not need to make these choices manually each time you access the dashboard page.
8. To view your saved customization, return back to the dashboard>page options>Apply Saved Customization>Select your saved customization (i.e. Customization Ex. Shown below):

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