

QUICK GUIDE: Working with Briefing Books

(Editing, Downloading, and Adding)

You can store a static snapshot of dashboard pages or individual requests in one or more briefing books. You can then download and share briefing books for viewing offline.

1. Go to UWBI Production and sign in: <https://uwbi.wisconsin.edu>
2. From your home page, open a dashboard and navigate to the page to add or that contains the analysis you want to add. On the bottom of the analysis you'll see the **Add to Briefing Book** link.



ADDING

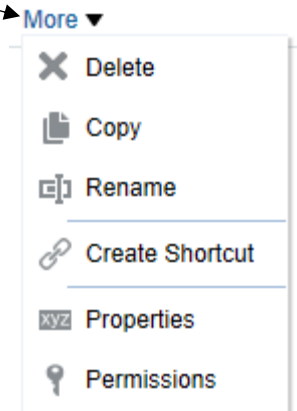
3. To add the results of an individual analysis to a briefing book:
 - a. Edit the dashboard and select **Add to Briefing Book**.
 - b. Complete the **Save Briefing Book Content** options.
 - c. In the Save Briefing Book Content dialog, click **Browse**.
 - d. In the Save As dialog, specify the appropriate location for the briefing book:
 - i. Specify the location in which to save the briefing book in the Save In field. Enter a name for the briefing book in the Name field. Optionally enter a description in the Description field and click OK.
 - e. Existing briefing book
 - i. Select the briefing book and click OK.
 - f. Complete all the remaining fields
 - g. Click **OK**.

EDITING

1. In the global header, click **Catalog** to display the Catalog page.
2. Navigate to the briefing book to edit and click **Edit**.
3. In the Edit Briefing Book dialog, to change content:
 - a. Select the content.
 - b. Click **Edit Page** to display the Page Properties dialog.
 - c. Change the content type, the number of navigation links to follow for updatable content, or the content description as needed.

 **Test Briefing Book Save** | Last Modified 6/11/2019 10:09:28 AM |
 Edit PDF Web Archive (.mht) More ▾

- d. Click **OK**.
4. To reorder content, select the content and then drag and drop it to the desired location.
 5. To delete content, select the content and click **Delete**.
 6. Click **OK**.



DOWNLOADING

1. In the global header, click **Catalog** to display the Catalog page.
2. Navigate to the briefing book to download.
3. Perform one of the following actions:
 - To download the briefing book in PDF format, click **PDF** and open or save the file.
 - To download the briefing book in MHTML format, click **Web Archive (.mht)** and open or save the file.

ADDING TO DASHBOARD PAGE

1. Open the dashboard for editing.
2. Navigate to the page to which you want to add a list of briefing books.
3. From the Dashboard Objects pane, drag and drop a folder object into a section.
4. Hover the mouse pointer over the folder object in the Page Layout area to display the object's toolbar and click **Properties**.
5. Enter a **Description** and **Content State** (Hidden, System, Read Only, and Do Not Index).
6. Click **OK** and click **Save** to save the dashboard.

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