DATA LITERACY CAMPAIGN 2025 - 2026

Office of Institutional Research, Planning, and Assessment

Custom Views in Tableau

Custom views in Tableau allow users to save a set of filters applied to a specific dashboard. Once all filters are applied, users can save the view to be used again in the future. Save time by creating customized views to apply desired filters all at once.

Steps to Create a Custom View in Tableau

1. **Open the dashboard:** Navigate to the dashboard you want to use to create a customized view.
2. **Apply filters:** Use the filters and make any desired changes to the dashboard.
3. **Save the view:** Click **Save Custom View** in the toolbar, located either along the top or bottom of the dashboard. Name the view and click **Save**.
4. **Access the Manage Custom Views menu:** Click on **View: Original** in the toolbar. View your list of custom views as well as the original default view.

Sharing and Default Settings

- **Make it your default:** You can choose to make your saved custom view the default one you see every time you open the dashboard by selecting the "Make it my default" option.
- **Share with others:** You can share your view with others who also have access to the dashboard by copying and pasting the URL for the custom view.

Note: Custom views are only applicable on dashboards located on the Internal Dashboard. Custom views are not applicable on public dashboards.