

## Quick Start Guide

Save time and reduce manual tasks with Tableau's Custom Views and Subscription tools. This quick start guide will walk you through how to quickly set up custom views and subscriptions to streamline reporting processes and give you more time back in your day.

These useful and often underutilized tools can eliminate the need to manually distribute exported reports.

## Automate Reports: Tableau Custom Views and Subscriptions

Tableau's easy-to-use Custom View and Subscriptions features help automate custom reports and save time.

Stay up-to-date on the latest data in a particular view, or share that view with others to ensure they have access to the most current information.



### Custom Views

Tailor your dashboards to fit unique needs and save personalized settings. Quickly access the insights that matter most without repetitive adjustments.



### Subscriptions

Schedule email updates of key reports to get everyone the unique information they need. Tableau can automatically distribute custom reports and send individual report emails.

**Follow the steps outlined on page 2 to start using these features today!**

**NEED HELP?**  [researchanalytics@uky.edu](mailto:researchanalytics@uky.edu)

# Let's Get Started

Users can create custom views of published Tableau reports with specific filters selected and then set up subscriptions that will automatically send emails with the report filtered to the specifications outlined by the custom view. For example, a report of all awarded projects can be filtered to a specific college, and then a subscription can be set to send the filtered report at a specified interval to leadership of that college.

## Custom Views



### Open the Dashboard

Navigate to the dashboard you want to customize.



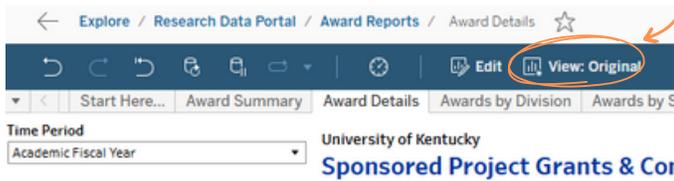
### Adjust Filters

Use the filters to limit the report to the specific data you're interested in. This might include selecting certain dates, colleges, or other criteria.



### Create Custom View

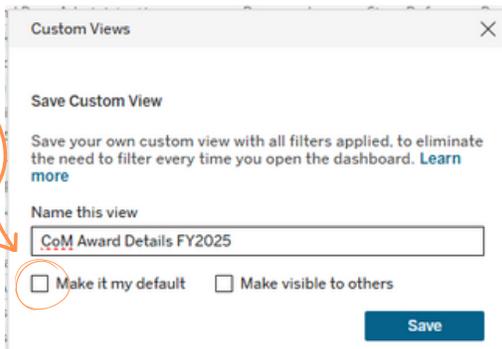
Once the filters are set up, click "View" at the top of the dashboard.



### Save The View

Use a name that clearly describes what the report shows to make it easy to identify later and then click "Save".

CHECK THIS BOX IF YOU WANT THE REPORT TO DEFAULT TO THIS VIEW EVERY TIME YOU OPEN THE DASHBOARD



## Subscriptions



### Select Custom View

On the report you want to distribute, select the view you want to set up a subscription for.



### Navigate to Subscriptions

Once the correct view is selected, click "Watch" and then "Subscriptions" in the top bar.



### Add Recipients

Add the email addresses of the individuals you want to receive the report. You can add multiple emails.



### Choose Subscription Options

Select the frequency of the emails (e.g., daily, weekly), the format of the included report (e.g., PDF, image), and a custom message, if desired.



### Save Subscription

Click "Subscribe" to finalize the subscription settings.