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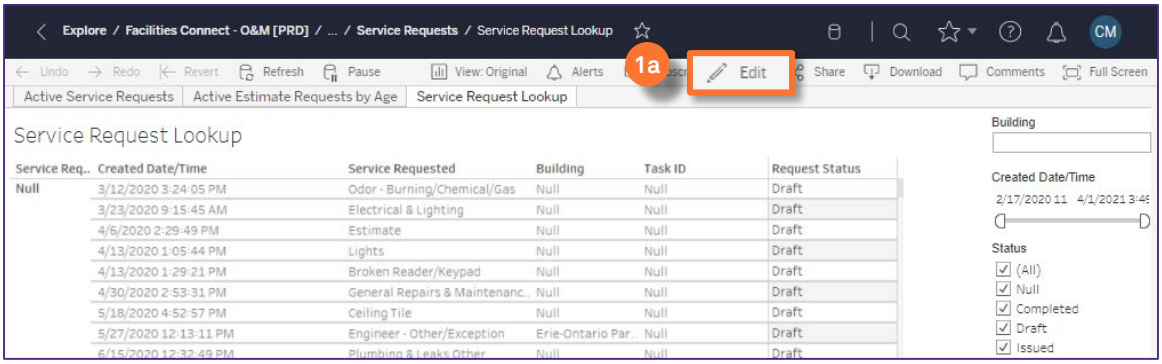
FACILITIES CONNECT REPORTING: SAVE A REPORT IN TABLEAU

Provides guidance on how to save an edited report in Tableau. If you have any questions regarding Tableau or require additional guidance, please reach out to facilities.connect@northwestern.com.

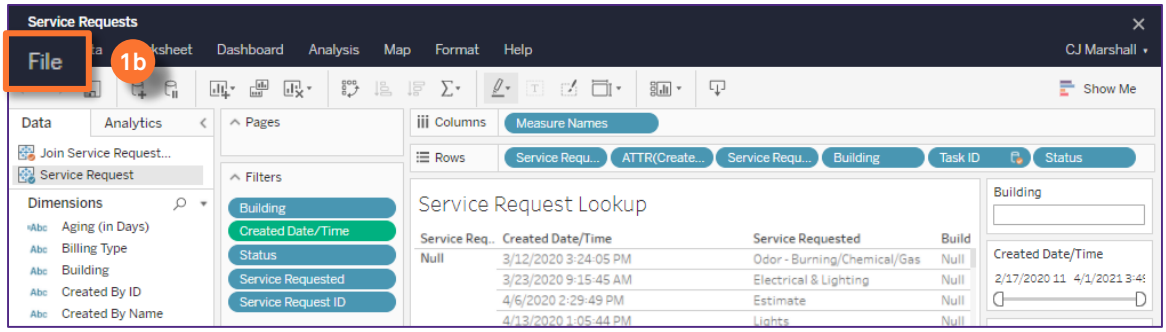
DIRECTIONS:

1 Once you are in the report you wish to save,

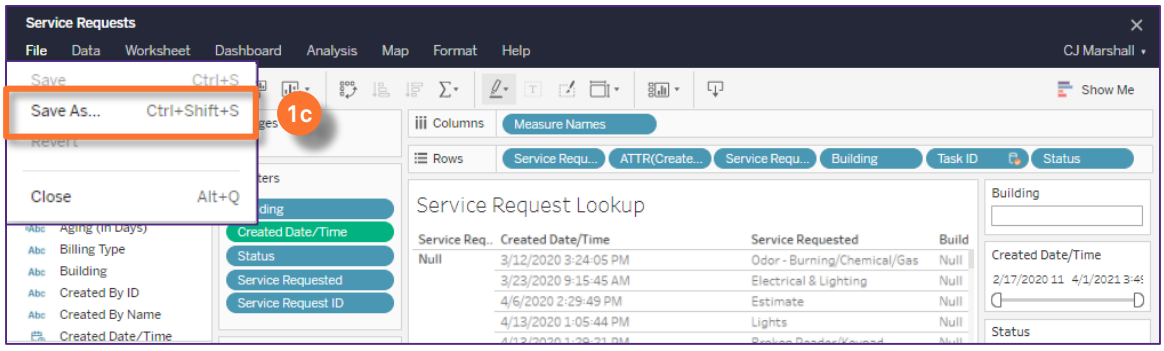
1a Click the **Edit** button.



1b Once in Edit view, Click **File**.



1c From the drop down menu, click **Save As**.



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FACILITIES CONNECT REPORTING: SAVE A REPORT IN TABLEAU

DIRECTIONS:

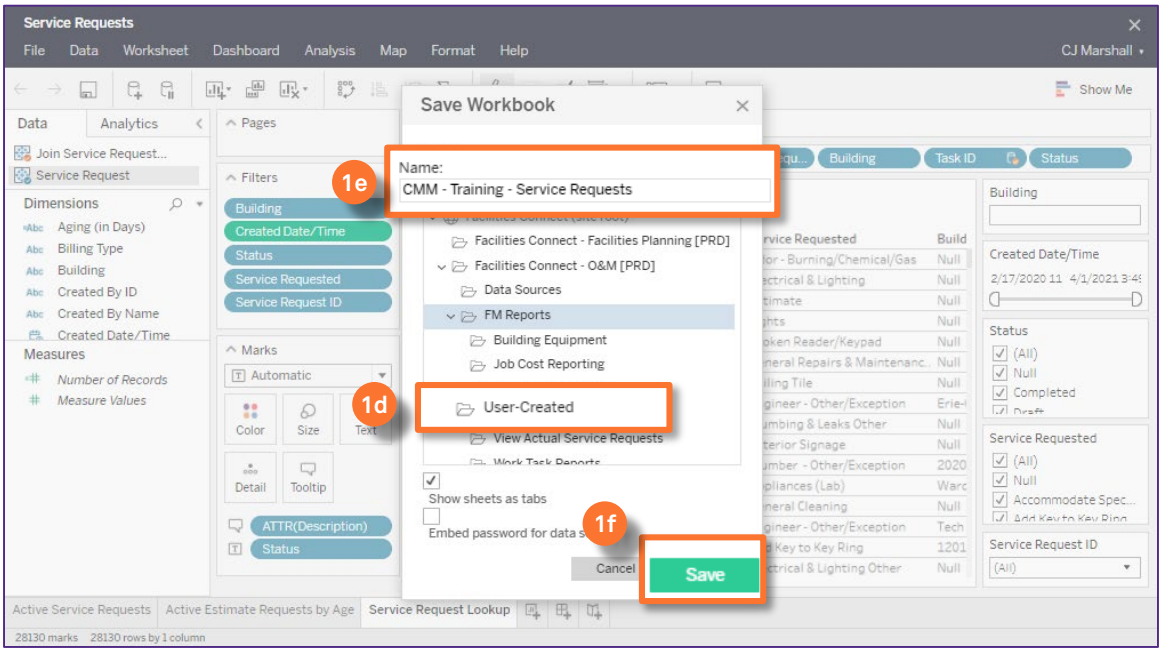
1 Continued,

In the Save Workbook screen,

1d Select the folder labeled **User-Created**.

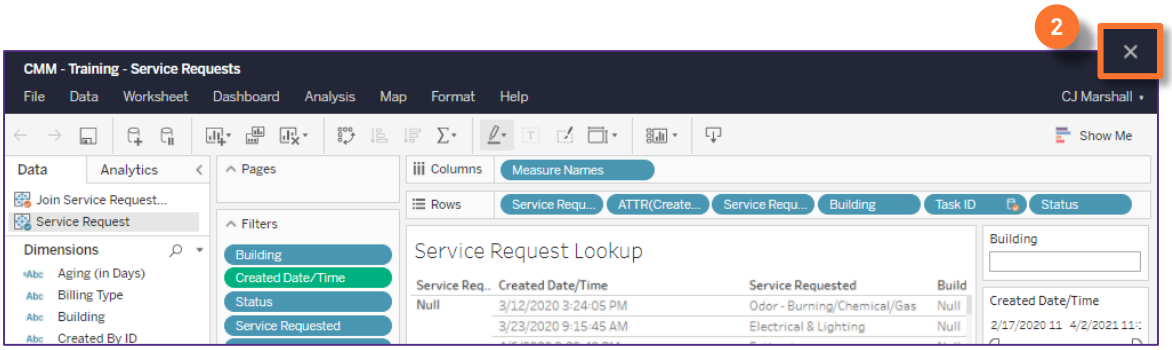
1e Enter a name for the report using the naming convention **Initial – Department – Report Name.**

1f Save the report by clicking the green **Save** button.



2 Once you have saved the report,

2 Close the report using the **X** button in the upper right hand corner.



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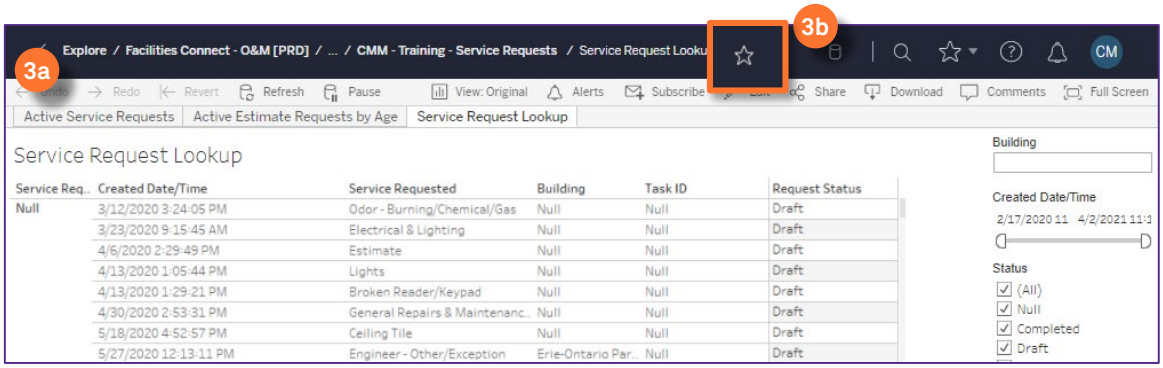
FACILITIES CONNECT REPORTING: SAVE A REPORT IN TABLEAU

DIRECTIONS:

3 On the main report view, save the report to your favorite to quickly access the report any time,

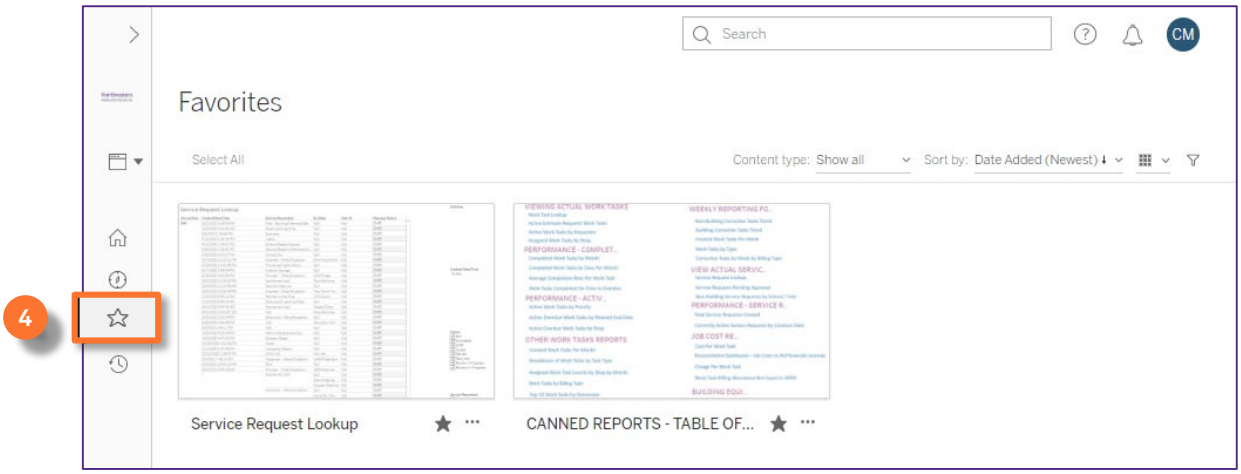
3a Locate the new name across the top of the report.

3b Click on the Star button.



4 Access your favorites from the main Tableau screen,

4 Click on the Star button on the left hand legend.



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