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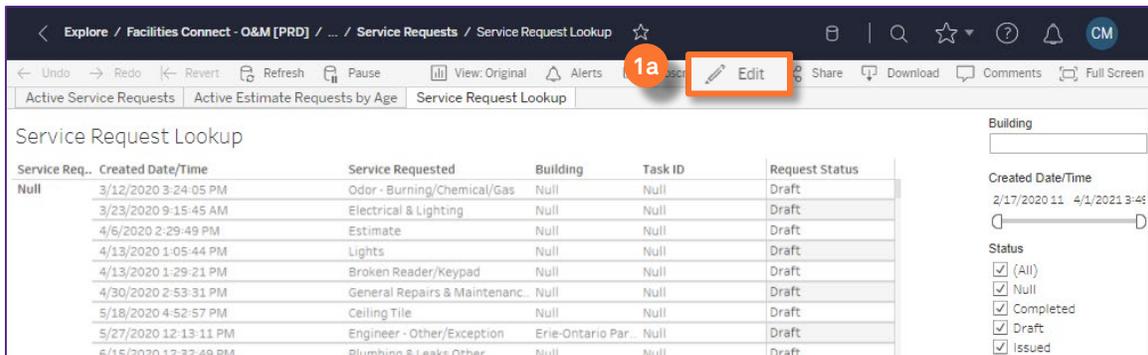
FACILITIES CONNECT REPORTING: SAVE A REPORT IN TABLEAU

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.

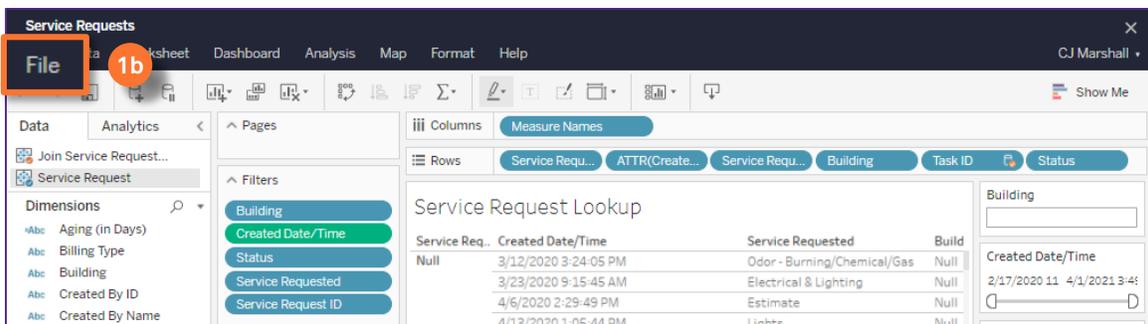
DIRECTIONS:

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

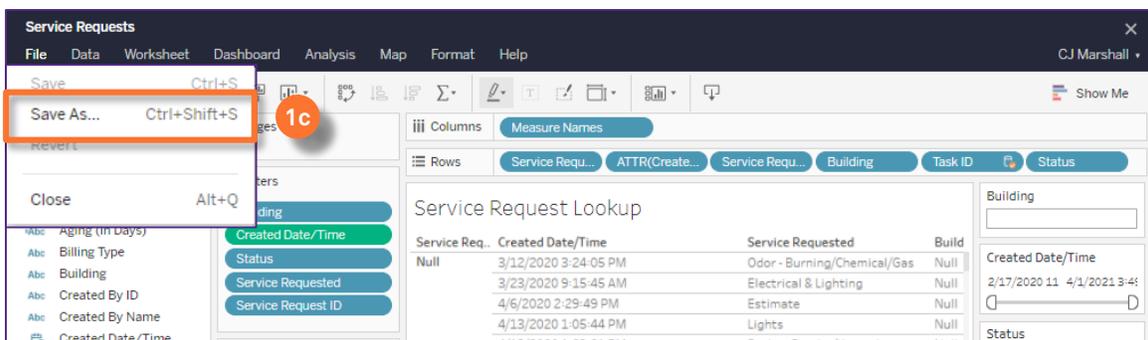
1a Click the **Edit** button.



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



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

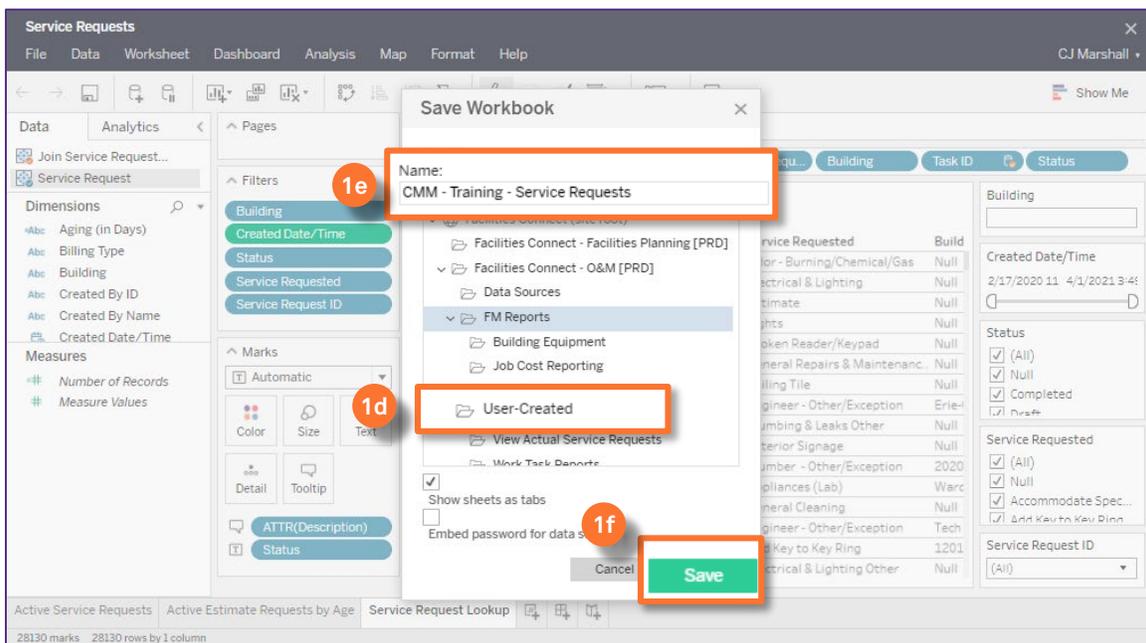


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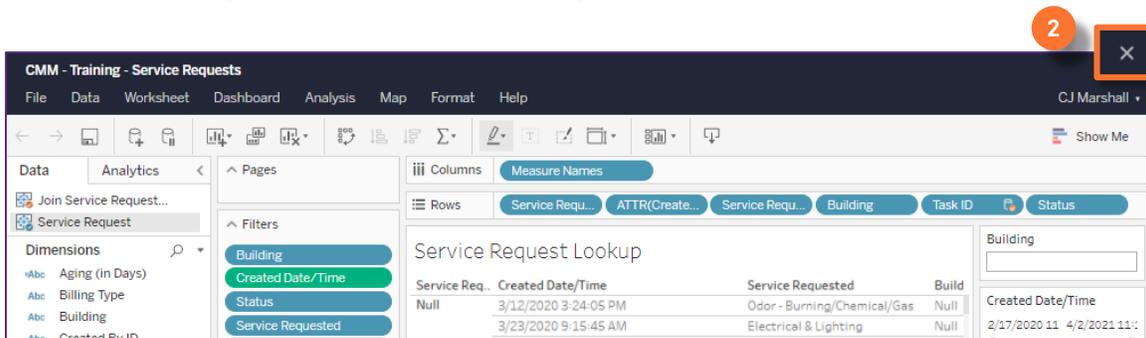
DIRECTIONS:

- 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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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.

Service Request Lookup

Service Req..	Created Date/Time	Service Requested	Building	Task ID	Request Status
Null	3/12/2020 3:24:05 PM	Odor - Burning/Chemical/Gas	Null	Null	Draft
	3/23/2020 9:15:45 AM	Electrical & Lighting	Null	Null	Draft
	4/6/2020 2:29:49 PM	Estimate	Null	Null	Draft
	4/13/2020 1:05:44 PM	Lights	Null	Null	Draft
	4/13/2020 1:29:21 PM	Broken Reader/Keypad	Null	Null	Draft
	4/30/2020 2:53:31 PM	General Repairs & Maintenanc..	Null	Null	Draft
	5/18/2020 4:52:57 PM	Ceiling Tile	Null	Null	Draft
	5/27/2020 12:13:11 PM	Engineer - Other/Exception	Erie-Ontario Par..	Null	Draft

4 Access your favorites from the main Tableau screen,

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

Search

Favorites

Select All

Content type: Show all

Sort by: Date Added (Newest)

Service Request Lookup

CANNED REPORTS - TABLE OF...