Getting Started with Tableau report

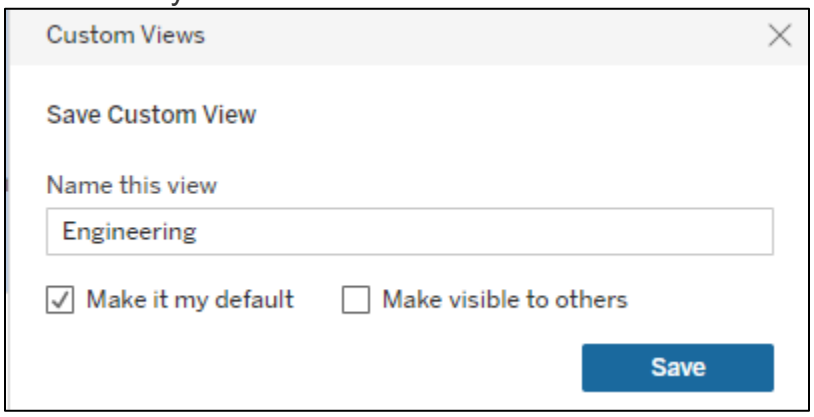
1. **Tableau Report** Click the Tableau report link. Here is the sample report link: https://dataviz.rae.osu.edu/#/views/TableauFinancialBalancesSummarization/FinancialBalancesSummarybyWorktags?:iid=1
   Based on your security role, you will be able to view/download the crosstab or detail data from the report.

2. **Custom default view** Based on your role, you can frequently review the specific unit or college you set as a default view or custom view in the Tableau server.

   i. **Filters and details pane** Click on the filter icon and set the Cost Center Level 06 filters to “Arts and Sciences” or “Engineering” or “Veterinary Medicine” or your specific unit

   ii. **Custom Views** From the toolbar, click on “View: Original”, and the Custom Views window will pop-up and enter a name for the custom view. Then select whether you want it to the default view you see, and if it should be visible to others who view the workbook.

   - Make it my Default
   - Make visible to others



   Click **Save**.

If you required an additional assistance here is a link that Tableau has provided. https://help.tableau.com/current/pro/desktop/en-us/customview.htm