Custom Views in Tableau

A Custom View is a copy of a view that has your selections and filters applied. You can use Custom Views to save your filters, sorts, or selections, without changing the original view. Custom Views are a good option if you find yourself changing a Tableau view every time you open it.

Tableau feature documentation: <https://help.tableau.com/current/pro/desktop/en-us/customview.htm>

Steps:

1. Open the dashboard and make the filter or sort changes you wish to save.
2. In the screenshot below, in the red ovals, I changed the Campus to Northwest and the Attribute 2 to Advisor.
3. In the blue toolbar, click “View”. The toolbar may be at the bottom or the top of the screen.
4. Give the view a name.
5. If you want this view to load when you first open the workbook, check the box “Make it my default”.
6. If you want others to be able to pick the same view, check the box “Make it visible to others”.
7. Save.
8. Each Custom View saves the chosen filers and sorts for the entire workbook.

