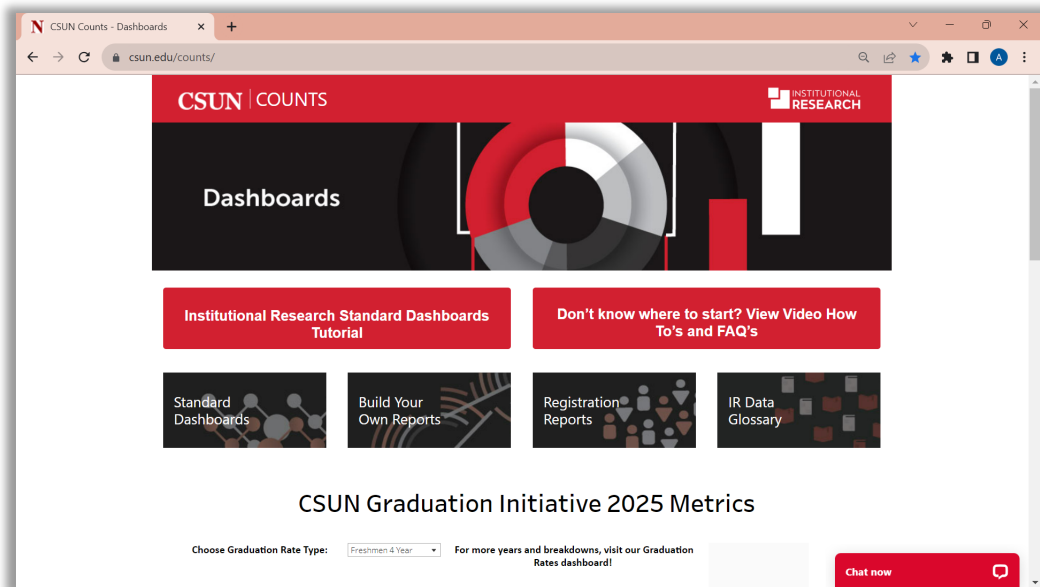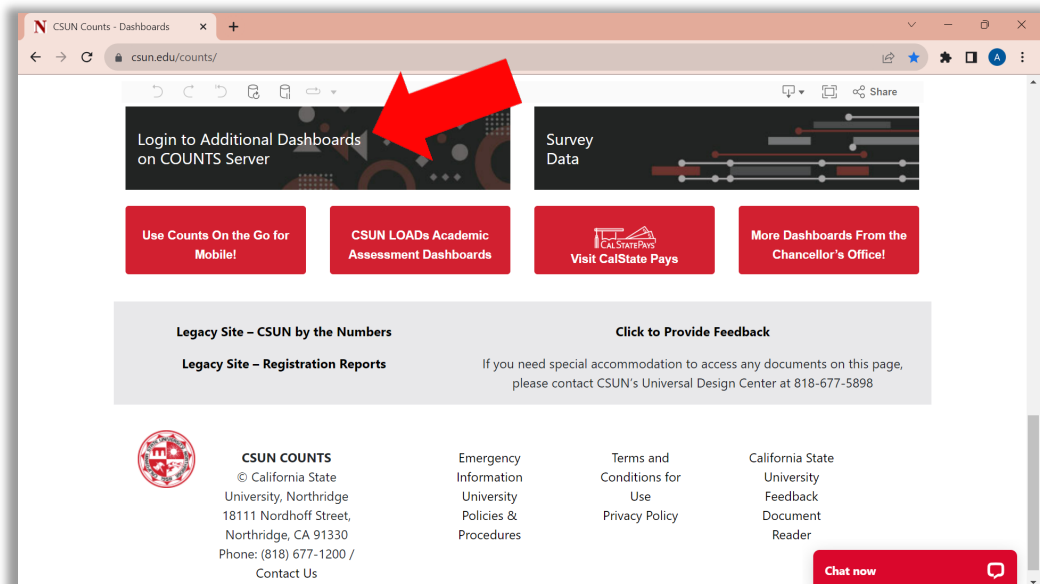# Creating a Custom View for IR Dashboards

A custom view allows you to save a specific view along with filter selections and sorting on a published dashboard. This can be helpful if you find yourself repeatedly applying the same filters on a dashboard to fit your specific data needs.

1. **Start on the CSUN Counts page:** https://www.csun.edu/counts/

2. **Scroll to the bottom of the page, select "Login to Additional Dashboards…"**

3. **Sign in to the Tableau server by using your CSUN user ID and password.**

4. **Select the dashboard you are interested in viewing.**
   a. *Note:* **To follow the example below, please go to https://www.csun.edu/counts/ -> Standard Dashboards -> Characteristics of All Students -> All Graduate Students**
5. **Select the filters you want to save.**
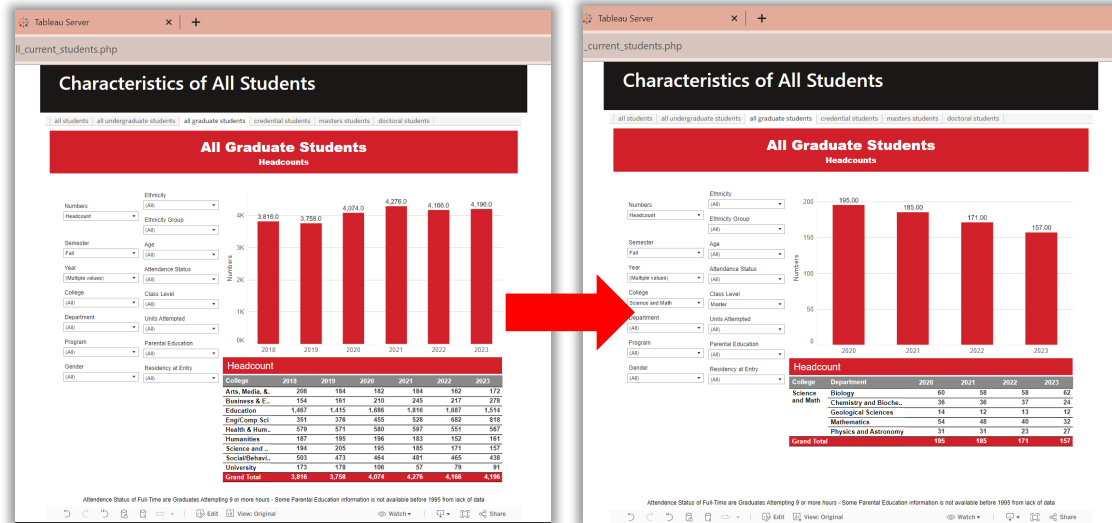
6. Click the "View: Original" icon in the center of the bottom gray banner.
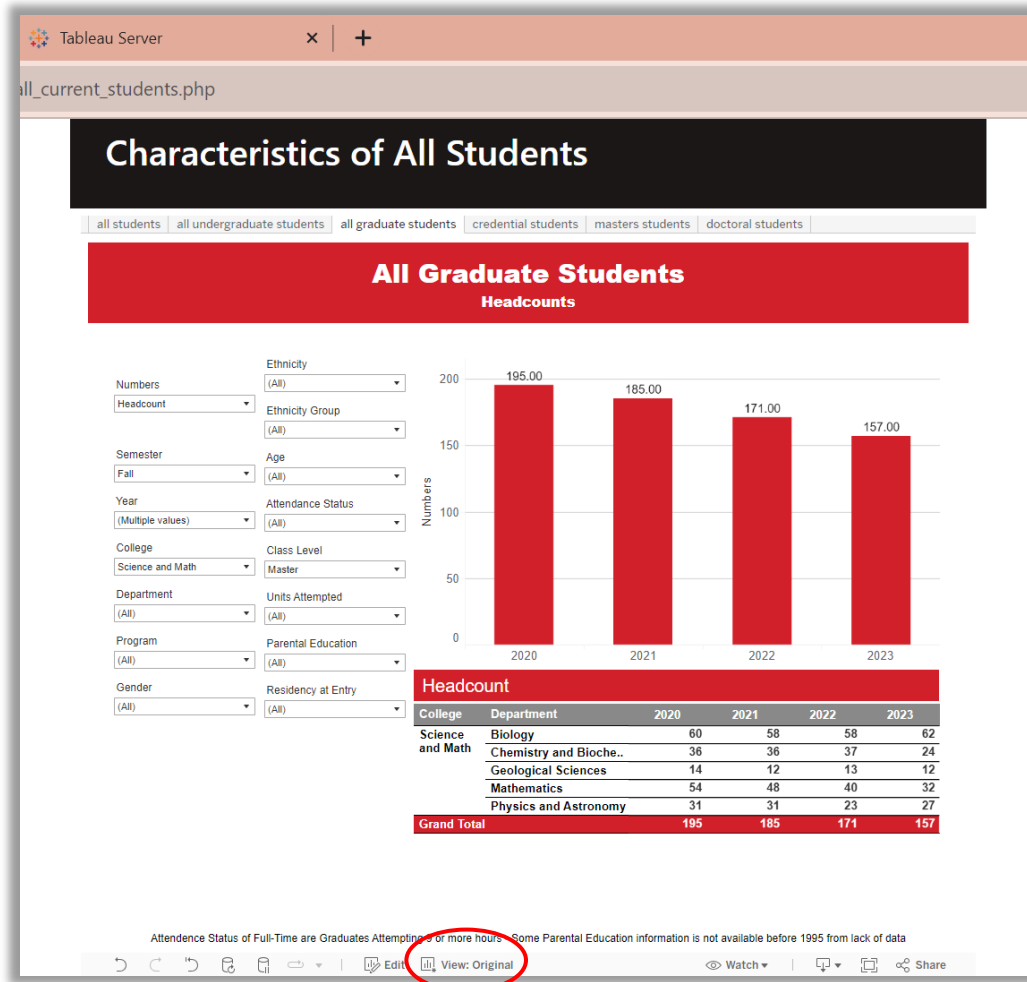
7. **Name this custom view.**
   a. *Optional:* **Select the box "Make it my default" if you would like the view to display every time you are logged in and visit the dashboard.**
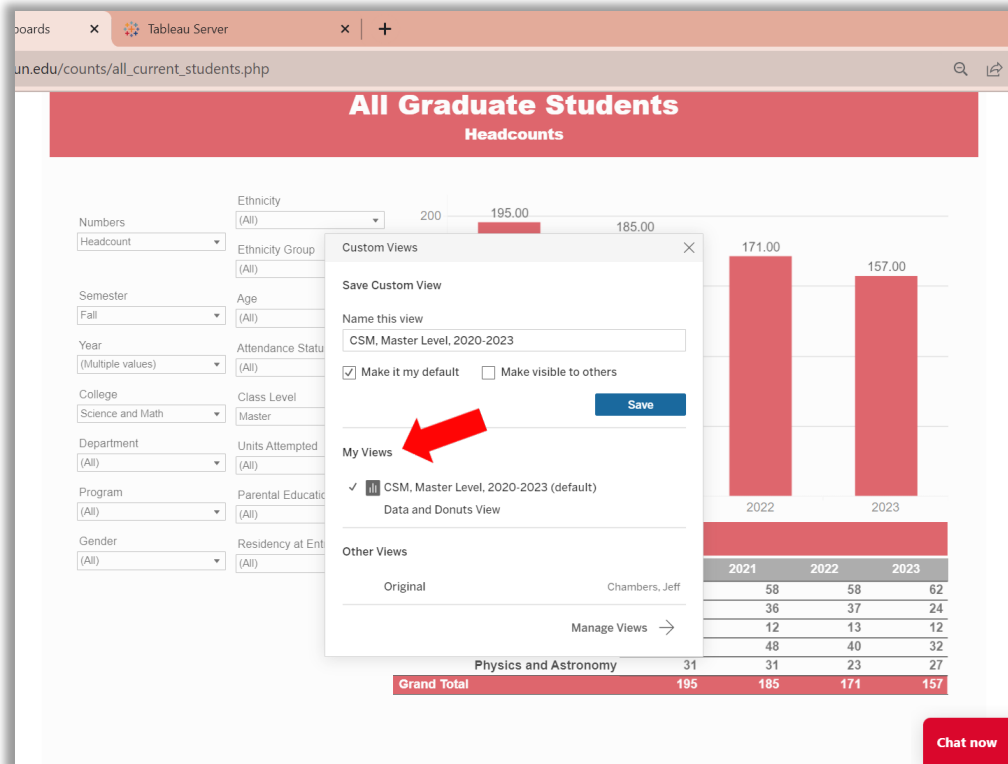   b. *Note:* **Do not select "Make visible to others."**

8. **Make sure you save your custom view!**
9. **You can now see which display you are viewing in the center of the bottom gray banner.**

10. **Whenever you are signed in to the Tableau server, you can see your saved custom views under the "My Views" header.**

**Need extra help? Contact us at ir@csun.edu or visit our contact page to find the Data Consultant assigned to your department! https://www.csun.edu/institutional-research/contact-us**

Sharing a Custom View with Other Users

You can also share your custom view with other CSUN users. This allows the other user to see the same filtered view that you have saved as a custom view. Now, instead of sending screenshots, you can send a link with the selected filters displayed!

1. **Select the share button on the bottom right side of the gray banner.**
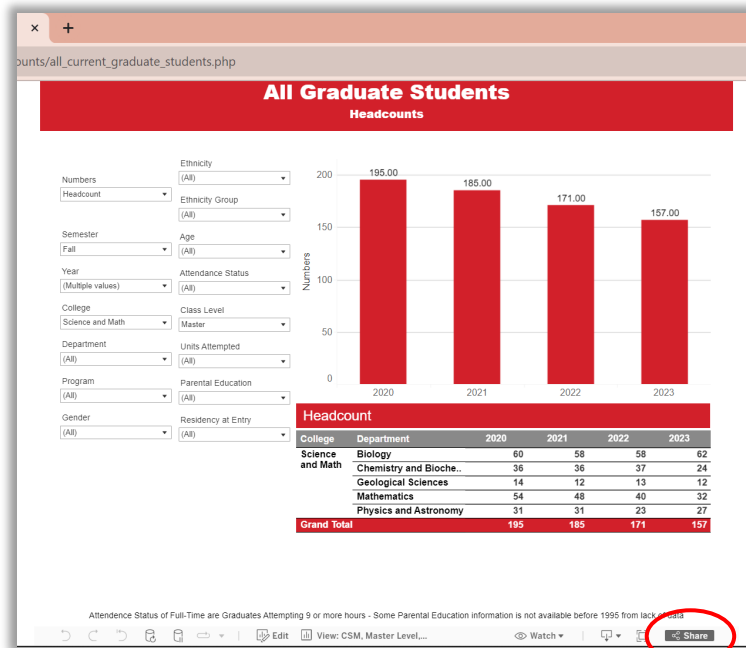
2. **Select 'Copy Link' to add to your clipboard, share the link with others!**