Tableau Report Access & Configuration

Report: UNITY User Access Report

Quick Reference Guide

UNITY User Access Report: Provides key UNITY user account access information for your operational review.

Open Email Invitation from no-reply@tableau.com

Click on "Go to Workbook"

This will log you into your Tableau "Favorites" page

+ableau

Joseph Johnson (jjohnson@juvenilecompact.org) shared the workbook "UNITY User Access Report (Approved)" with you.

Joseph Johnson says:

Custom Message

User Specific View

→ Go to Workbook

Keep your data within reach.

Get Tableau Mobile for free now.
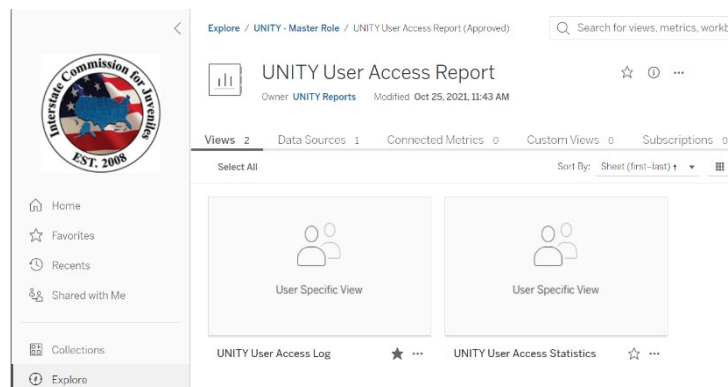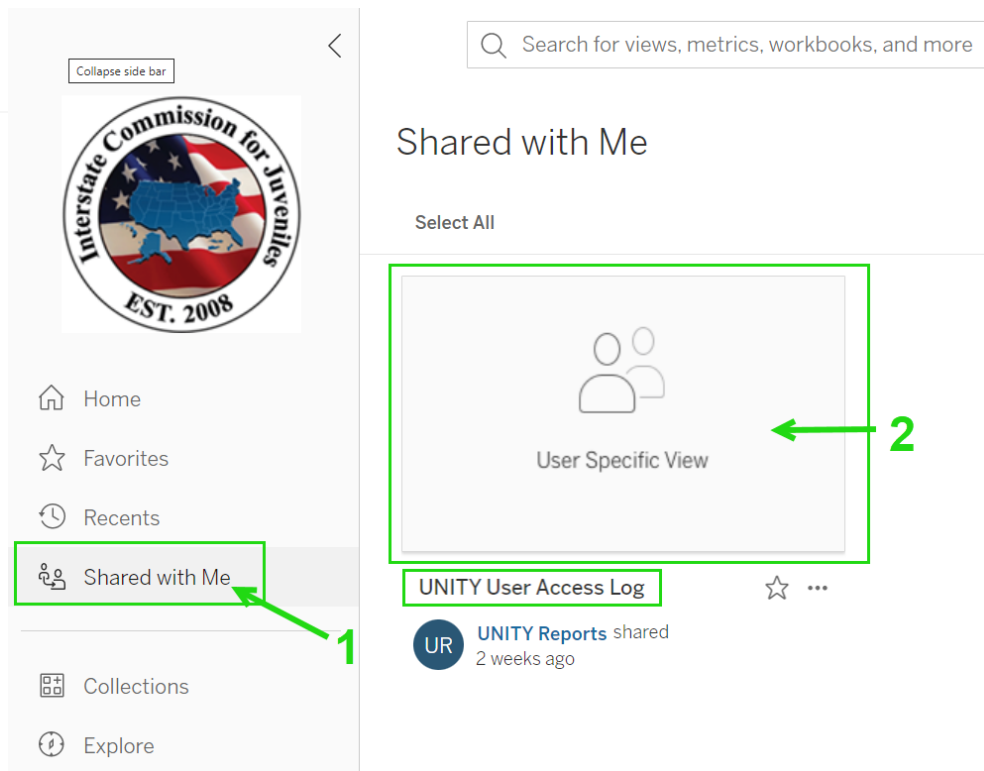
Download on the App Store GET IT ON Google Play

1   Click on **"Shared with Me"** , Once logged in Tableau

2   Click on the Shared workbook **"Folder Icon"** associated with the **"UNITY User Access Log"**

This will open all 2 worksheets of the UNITY User Access Log workbook
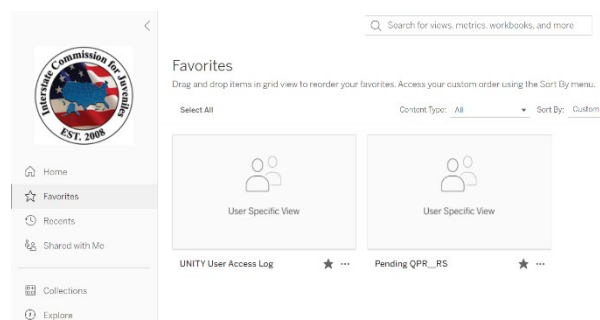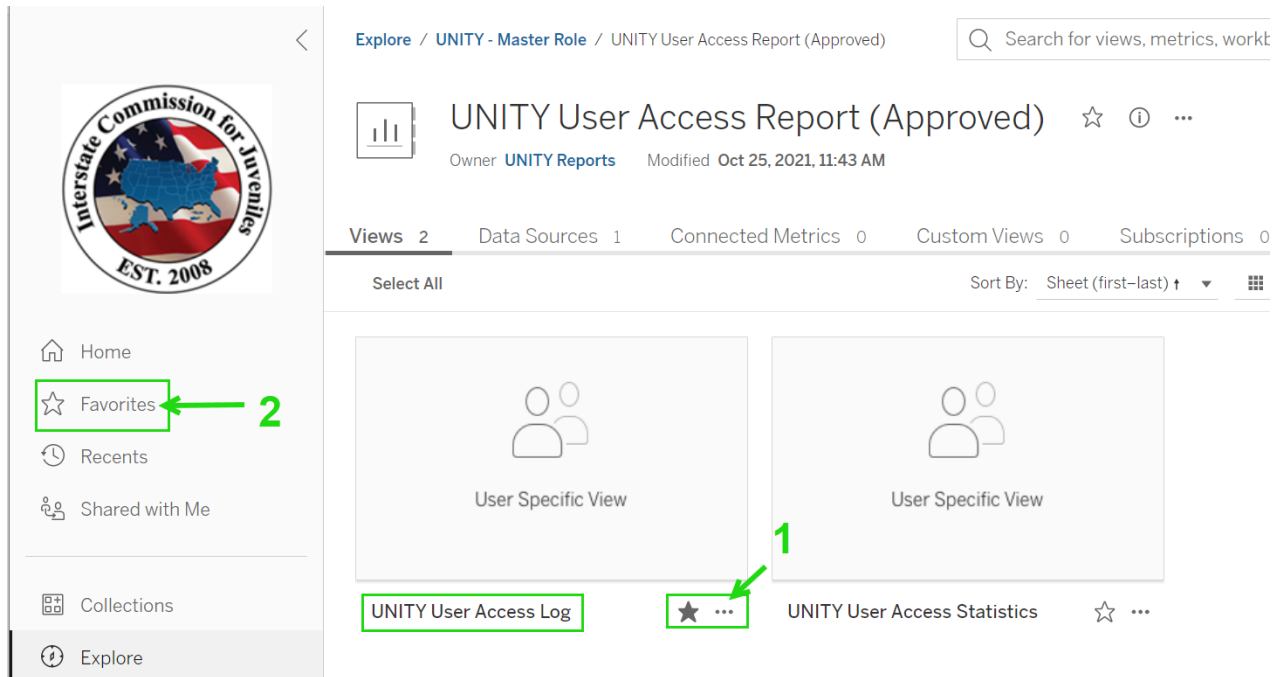
- UNITY User Access Log
- UNITY User Access Statistics

1 Click on the "Star" of the "UNITY Access Log" worksheet.

This will set this workbook & worksheet report to your favorites

2 Click on "Favorites" in the Navigation

This will open your "Favorites" & present your "UNITY Access Log" worksheet in favorites

Click on the Shared workbook **"Folder Icon"** associated with the **"UNITY Access Log"**

This will open your 2 worksheets with the "UNITY Access Log" as worksheet 1 (Tab 1)

- UNITY User Access Log   (Tab 1)
- UNITY User Access Statistics   (Tab 2)

Report Key Information & Operational Tips

UNITY User Access Log

1 **Click** on the "UNITY User Access Log" worksheet Tab 1

2 Viewing Options
   - Use the 5 Filter Options
   - From within the report, you can "Sort" the "Last Name" column
       o For more sortable columns & filters download the report to excel.
           - See next page for download process

UNITY User Access Log – Download to Excel

Click on the **"UNITY User Access Log"** worksheet Tab 1

1. Click on "Download"
2. Click on "Crosstab"
3. Click on the report and select " Excel"
4. Click on Save

From your "Download Folder" Double Click on the report to open

Once in Excel, you can apply Filters and Sorts to all report columns

UNITY User Access Statistics

Click on the "UNITY User Access Statistics" worksheet Tab-2

This report only shows the core login metrics.

← Undo	→ Redo	← Revert	⟳ Refresh	⏸ Pause		📊 View: Original	〽 Metrics

UNITY User Access Log	UNITY User Access Statistics

User Access Statistics

State	# of Successful Logins	Total Active Users	Login %
Illinois	442	540	82

Save Your Report Configuration Settings

1 **Click** back on **the 1ˢᵗ Report Tab** "UNITY User Access Log"

2 **Click** **"View Original"** in the navigation menu

This will open the **"Save Custom View"** window. In the window

3 **Name this view** **"UNITY User Access Filter Setting"**

4 **"Check Mark"** **"Make it my default"**

5 **Click on "Save"**