UCCS Institutional Research
UNIVERSITY OF COLORADO **COLORADO SPRINGS**

Steps to Add a Subscription in Tableau

Adding a subscription allows Tableau to send data directly to your email inbox

1) Either go to the exact link of the specific report that you want to subscribe to,
    OR
   Go to Tableau (https://viz.cu.edu), click "Explore" along the left-hand side, and then click inside the "Institutional Research" folder to find the workbook that you want to subscribe to. Click on the visualization to pull up the report.

2) Once you have the report pulled up, make sure you are on the tab/view that you want. You have the option of including data from just one specific tab/view or all of the tabs/the entire workbook.

3) In the upper right-hand corner, click the arrow next to "Watch" and then click on "Subscriptions."
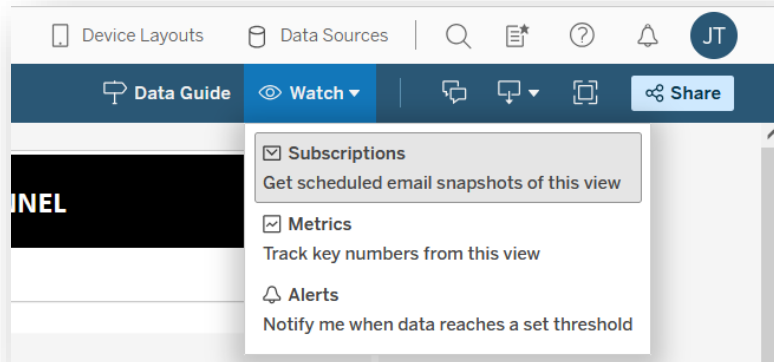
4) In the pop-up box, click the checkbox that says, "Subscribe me."

5) Next, under "Include," check either "This View" (if you only want data from the current tab you are on) or "Entire Workbook" (if you want data from all of the tabs).

6) Under "Format," choose your preferred format. If you are unsure, select both "Image and PDF." With PDFs, for "Orientation" select "Landscape."

7) Feel free to change the "Subject" of the email and add in a "Message."

8) Under "Frequency," you want to choose "When Data Refreshes" for most cases. For reports that get refreshed nightly, daily emails may be too much. In those cases, select "On Selected Schedule" and then choose the desired schedule from the "Schedule" dropdown.

9) When everything looks correct, click the "Subscribe" button in the bottom right.

Note: You can always change and/or delete the subscription by clicking on "Manage Subscriptions" in this pop-up under "Watch" or in the actual subscription email.

For questions or concerns, email us at irdata@uccs.edu.