Exporting Tableau Data into Excel

Users may export "Tableau workbooks/data" into Microsoft Excel. This explains how to export a table as a crosstab and underlying data into Excel.

Exporting Data as a Crosstab

Exporting as a Crosstab allows you to export data from both tabular charts and visual graphs/maps into a csv or xlsx file in Microsoft Excel.

- 1. **Set the filters appropriately** because only filtered data is exported. It is important to check filters every time you export underlying data to ensure you are working from a complete list.
- 2. Activate the chart by clicking on a cell or item within it. This tells Tableau which item you want to download when there are multiple items on the dashboard.
- 3. At the top or bottom of your screen, **select Download** and then **Crosstab**.



(If you followed steps 1-3 but your Crosstab option is grayed out, the workbook may not allow Crosstab data to be downloaded. To discuss your options, you may contact the developer team listed at the bottom of the dashboard.)

4. Select Download.

5. Select Format.



The cell you have clicked earlier that sheet will be tick marked, you may deselect



and select another sheet if you want. Now, it is ready to download in Excel format or you can choose csv format.

- 6. **Open the file.** Depending on your browser, the download may appear at the bottom of your screen (in Google Chrome).
- 7. **Save as an Excel file**. In Excel, look through your data and make sure it contains all the information you need. Repeat steps as necessary.

Exporting Underlying Details

Users may need to export additional, underlying data from a tabular chart. Follow these instructions for exporting underlying details into Excel.

- 1. Only filtered data is exported, so **set the filters appropriately**. It is important to check filters every time you export underlying data to ensure you are working from a complete list. Keep in mind the filters may be in the filter hidden icon.
- 2. Activate the table so that Tableau knows what item on the dashboard you want to export.
 - a. **Click once on any cell in the table.** This tells Tableau to download data pertaining to just this cell.

Date	e Loaded	Release	BP Area	Functional Area	Task ID	Task	Load Start Date Time	Load End DateTime	Total Task
Null	1	1.0	Null	PreLoad	4135	Get Validation reports report files ready (Data Conversion/Data Validatio	Null	Null	1
				Supplier Accounts	4168	Community Codes	Null	Null	
				Total					
			Access	Access	2723	Authentication Selector	Null	Null	
					2732	Tenant Challenge Questions	Null	Null	1

b. **Click on that same cell again.** This deselects the cell but keeps the table active. Now, Tableau knows you want to download all the data from the table (within the active filters) and not just that one cell.

Date Loaded	Release	BP Area	Functional Area	Task ID	Task	Load Start Date Time	Load End DateTime	Total Task
Null	1.0	Null	PreLoad	4135	Get Validation reports report files ready (Data Conversion/Data Validatio	Null	Null	1
			Supplier Accounts	4168	Community Codes	Null	Null	1
			Total					2
		Access	Access	2723	Authentication Selector	Null	Null	1
	_			2732	Tenant Challenge Questions	Null	Null	1
	 	Clinitate et a	all a set a					2
		Click that c	-	1774	Export Baseline Export of Tenant	Null	Null	1
		to unhighli	ght. This	2087	Currency Conversions	Null	Null	1
		leaves the	whole	2254	Message Queue Security Segment	Null	Null	1
				2258	Benchmark Subcategory Security Segments	Null	Null	1
		data Active	e. 🔰	2275	Job-Based Security Groups (Constrained)	Null	Null	1
	-			2279	Location-Based Security Groups	Null	Null	1
				2280	Manager Level-Based Security Groups	Null	Null	1

3. At the top or bottom right corner of your screen, **select Download** then **select Data**. If the Data option is grayed out, the workbook may not allow underlying data to be downloaded. To discuss your options, you may contact the developer team listed at the bottom of the dashboard.

The Ohio State University

	Revert (Refresh G	Pause		<	Data Details "🕕 View: Original 💡	🛆 Alerts 🖂 Me	trics 124 Subsc	ribe / Edit	og Share	Download 💭 Comments
1901		-					-		-	and the second se	Nul
9/27/2020			CORPORED AND ADDRESS AND ADDRESS ADDRES				THE REAL PROPERTY AND		THE R. LOW		010
9/28/2020											0.1.1A
9/29/2020											0 1.18 AB
9/30/2020											0 1.1B CEC
10/1/2020				1					/		01.2
10/2/2020	1. 2.			1.0							01.3
10/9/2020							1				01.4
10/10/2020											BP Area
10/30/2020											(All)
	12 AJ	M 2 AM	4 AM 6 A	M 8 AM	10 #	Download Select your file format.	× 6PM	8 PM	10 PM	12 AM	V Null V Access V Cross V FIN
							/				Access Cross FIN HCM
		1			_	Select your file format.	\langle	Load Start Date	Load End		Access Cross FIN HCM COM
Date Loaded		BP Area	Functional Area	Task ID	Task	Select your file format.	\leq		1	Total Task	V Access V Cross V FIN V HCM V OCM V PATT V SCM
		1			_	Select your file format. Image Data Crosstab	lata Validatio	Load Start Date	Load End		V Access V Cross V FIN V HCM V OCM V PATT
	Release	BP Area	Functional Area	Task ID	Task	Select your file format. Image Data	\leq	Load Start Date Time	Load End DateTime	Total Task	Access Cross FIN HCM COM COM COM COM SCM COM COM COM COM COM COM COM C
	Release	BP Area	Functional Area PreLoad	Task ID 4135	Task Get Valida	Select your file format. Image Data Crosstab	\leq	Load Start Date Time Null	Load End DateTime	Total Task	Access Cross FIN HCM CCM ACCM ACCM CCM CCM CCM CCM
	Release	BP Area	Functional Area PreLoad Supplier Accounts	Task ID 4135	Task Get Valida	Select your file format. Data Crosstab PDF	\leq	Load Start Date Time Null	Load End DateTime	Total Task	Cross Cross FIN COM COM COM PATT SCM Technical Functional Area
	Release	BP Area	Functional Area PreLoad Supplier Accounts Total	Task ID 4135 4168	Task Get Valid; Communi	Select your file format. Data Crosstab PDF	\leq	Load Start Date Time Null Null	Load End DateTime Null Null	Total Task	Cross Cross FIN FIN HOM OCM OCM OCM SCM Technical Functional Area Q(A))
	Release	BP Area	Functional Area PreLoad Supplier Accounts Total	Task ID 4135 4168 2723	Task Get Validi Communi Authentici	Select your file format. Image Data Crosstab PDF PowerPoint	\leq	Load Start Date Time Null Null	Load End DateTime Null Null	Total Task	Cross Cross Cross Cross FIN HOM COM COM COM COM COM COM Technical Functional Area V A(1) Cacess Ganking and Sett Guines Assets
Date Loaded Null	Release	BP Area	Functional Area PreLoad Supplier Accounts Total Access	Task ID 4135 4168 2723	Task Get Validi Communi Authentici Tenant Ci	Select your file format. Image Data Crosstab PDF PowerPoint	\leq	Load Start Date Time Null Null	Load End DateTime Null Null	Total Task 1 2 1 1	Access Cross Cross FN HCM COM SCM ScM ScM Functional Area V (A) Access Aanking and Sett

4. A preview of your underlying data will appear. At the top, **go to the Summary or Full data tab**. Keep in mind only the first 200 rows appear in this preview. Once you export, you will see all exported data.



5. **Full data or next to Summary tab** (Reporting_Amount) on the below snapshot. You can download the most fields by checking the "Show all columns" checkbox.



- 6. Click on Download all rows as a text file
- 7. **Open the file.** Depending on your browser, the download may appear at the bottom of your screen (in Google Chrome)
- 8. **Make sure this is saved as an xlsx file**. By default, the data is downloaded as a csv file which does not support formatting changes, charts or pivot tables.
 - a. Select the File tab at the top of Excel
 - b. Select Save As



9. You may create a pivot table based on the exported data or you may use filter on the excel based on your data. Depending upon your needs, you may have to filter on an additional column.