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.

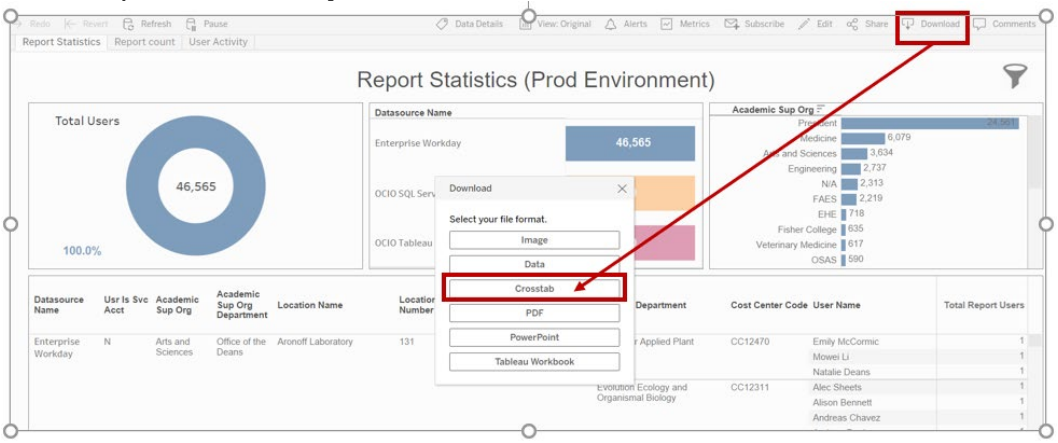
Exporting Data as a Crosstab

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.

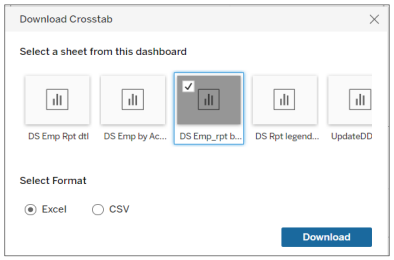
3. At the top or bottom of your screen, **select Download** and then **Crosstab**.



(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.

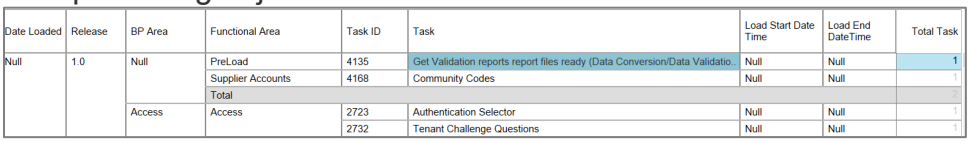
Exporting Underlying Details

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.

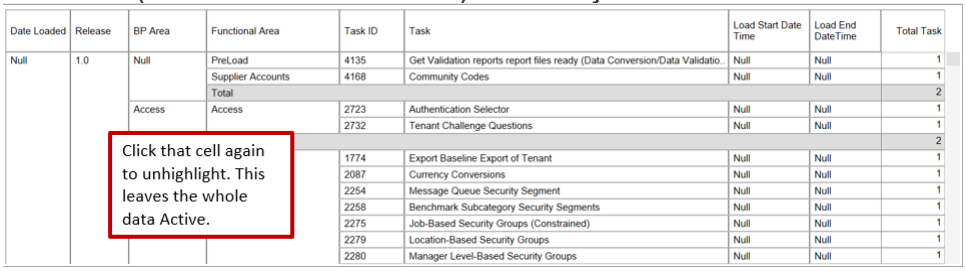
2. Activate the table so that Tableau knows what item on the dashboard you want to export.

   a. **Click once on any cell in the table.** This tells Tableau to download data pertaining to just this cell.



Date 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

   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.



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Null	1.0	Null	PreLoad	4135	Get Validation reports report files ready (Data Conversion/Data Validatio..	Null	Null	1
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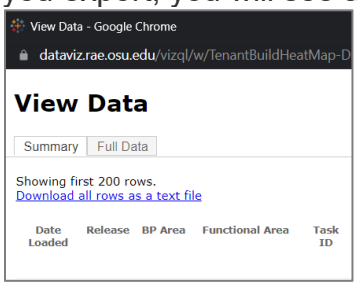
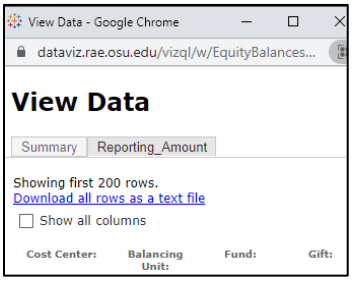
		Access	Access	2723	Authentication Selector	Null	Null	1
				2732	Tenant Challenge Questions	Null	Null	1
								2
				1774	Export Baseline Export of Tenant	Null	Null	1
				2087	Currency Conversions	Null	Null	1
				2254	Message Queue Security Segment	Null	Null	1
				2258	Benchmark Subcategory Security Segments	Null	Null	1
				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.

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

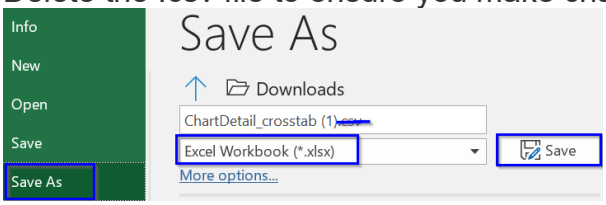
7. **Open the file.** Depending on your browser, the download may appear at the bottom of your screen (in Google Chrome)

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**

c. Select a folder and **remove .csv** from the file name
d. Below the file name, **choose Excel Workbook (*.xlsx)**
e. Press **Save**

You will now have 2 copies: the original .txt or .csv file and the Excel file. Delete the .csv file to ensure you make changes to the Excel file only.



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.