Lesson 12: Exercises 12.2 – Exporting Data

Business Scenario

One of leading consumer products and services companies uses Tableau to analyze a large amount of data on retail behavior, sales and profit, procurement of key inputs, and so on. This helps in gaining detailed insights into the company's performance. Now, they intend to send some of this information to their clients. As their clients are not familiar with Tableau, they need to send the views generated in some other format. These requirements can be met by publishing the views in the PDF format.

Overview

- Open the pre-created **Lesson 12 Exercise** workbook.
- Copy records from the Region and State Analysis View into Microsoft Excel.
- Export the Profit by State Graph as an image.
- Export records from Sales and Profit by Subcategory Graph to an Access file.
- Export entire workbook to PDF.

Detailed Instructions

1. Under the Start menu, point to **All Programs,** and select **Tableau 10.2**.
2. To open a workbook, under the File menu, select **Open.**
3. In the Open window, browse **Documents\My Tableau Repository\Workbooks** and select the **Lesson 12 Exercise** workbook**.**
4. Click **Open.**
5. Open the **Region and State Analysis View** Sheet.
6. To copy record to excel, under Worksheet menu, go to **Copy**, and select **Crosstab to Excel.**
7. Open the **Profit by State** Sheet.
8. To export as an image, under Worksheet menu, go to **Export** and select **Image.**
9. Save the jpg image on your system.
10. Open the Sales and Profit by Subcategory Graph.
11. To export records as an Access file, under Worksheet menu, go to **Export** and select **Data.** Save the Access file on your system.
12. Enter the name of the table and click **OK**.
13. To publish as PDF, on the File menu, select **Print to PDF.**

14. In the Print to PDF window, under Range, click **Entire Workbook.**

15. Click **OK.**

16. In the Save PDF window, browse through **Documents\My Tableau Repository** and save it as **Retail Analysis-PDF**.

17. Save and close the workbook.