








Analytics Suite download options

Getting started with Tableau Layout


When using a Tableau report, you will be interacting with Workbooks. Workbooks contain sheets, dashboards, and stories. Similar to Microsoft Excel, a Workbook can contain multiple sheets.


-  **Worksheet**
A worksheet is a single view in a workbook. You can add shelves, cards, legends, visualizations, and more in a worksheet
-  **Dashboard**
A collection of multiple worksheets used to display multiple views simultaneously
-  **Story**
A story is a collection of multiple dashboards and/ or sheets that describe a data story


With Workpath using Tableau for visualization, you have various download options for Analytics reports:


-  **Image:** Downloads an image of the view in .png format. Any filters, parameters, or selections currently applied in Tableau are reflected in the downloaded image.
-  **Crosstab:** Opens a dialog window to select download options. If viewing a dashboard, select a sheet from the dashboard to download. Under Select Format, select .csv or Microsoft Excel .xlsx.
-  **PDF:** Opens a dialog window to select download options. Under Include, choose what to download, such as specific sheets from a workbook or dashboard, or select all. Adjust scaling for image size and set paper size and orientation.
-  **PowerPoint:** Downloads the entire dashboard as an image in PPT format, just as it appears on the screen, or you can select "Specific sheets from this dashboard" to capture the sheets you desire as images in PPT format.

Note that any filters, parameters, or selections currently applied in Tableau are reflected in the downloaded document.

 If you want to capture your content exactly as it appears on the screen, you can apply any of the options above directly.

 However, if your content doesn't fit within the visible area and requires scrolling, we recommend applying the two options described below:

-  **Crosstab:**
 1. Click on the Crosstab option.
 2. Choose desired sheet(s) you want to download.
 3. Select the format: .csv or Microsoft Excel .xlsx.
 4. Download the data.

-  **PDF:**
 1. Click on the PDF option.
 2. Choose desired sheet(s) you want to download.
 3. Adjust scaling for image size ('Automatic' advised).
 4. Set paper size ('Unspecified' advised).
 5. Set orientation ('Portrait' or 'Landscape').
 6. Download the document.

