

Excel and Tableau: A Beautiful Partnership

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Millions of people use Microsoft Excel to track and sort data and perform various financial, mathematical, and statistical operations. It's a great resource for data collection and a common component in analytics toolkits. But while Excel comes equipped with many features that help you get started with data, Tableau takes your data to the next level with flexible and responsive analytics.

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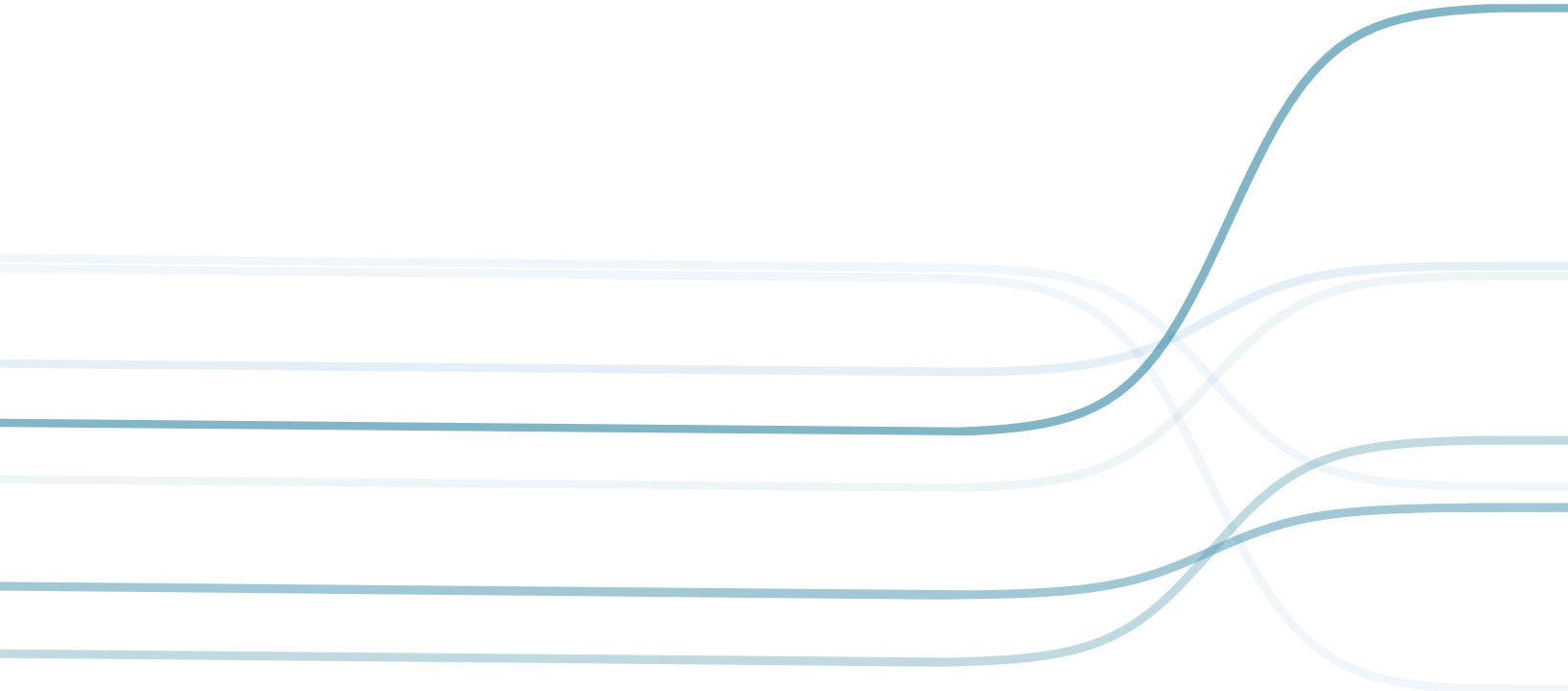
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Storing your data in Excel? Combine and integrate that data with Tableau.

As the traditional spreadsheet tool, Excel is used to add, collect, and store every detail of your data. But wading through a million rows of data scattered in disparate workbooks makes figuring out your data story overwhelming. You might find yourself lost, spending hours searching for the data that you want to focus on.

How can you know which workbook—or even which worksheet or tab—has what you need? And what if it doesn't? What if the data you store in Excel contains only part of your data story, and the other part is in a different tool?

While Excel is great for storing your data, Tableau can easily pull together all the data you have in seemingly disparate worksheets and workbooks—even data not stored in Excel. You can quickly analyze data from a combination of subtables, worksheets, and workbooks, all at once. With Tableau, you save time by getting a complete view of your data in one place.

The screenshot shows the Tableau interface with the following elements:

- Connections Panel:** Lists two Microsoft Excel connections: 'Bookshop_Sales_Month_Totals' and 'Bookshop_backup_Pres'.
- Sheets Panel:** Lists various data sources including Author, Award, Book, Checkouts, Edition, EditionCopy, Info, Publisher, Ratings, Sales Q1-Q4, and Series. A 'Go to Worksheet' tooltip is visible over the Publisher source.
- Data Source Diagram:** Shows 'BookshopSales' and 'Book' sources connected to a 'Publisher' source.
- Data Table:** A table with columns: BookID (Book), Title, and Auth ID. The data is sorted by Data source order.

BookID (Book)	Title	Auth ID
BB194	Ballinby Boys	AM329
NC652	Nothing But Capers	AS443
AD222	Alanna Saves the Day	BH149
PA169	Post Alley	BM856
TC188	Thatchwork Cottage	BM856
ZT703	Zero over Twelve	BM856
PP866	Portmeirion	BT132
RR774	Rystwyth	BT132
TM925	The Mallemaroking	BT132
CH391	Can I Be Honest?	CF829
NL209	No More Lightning	CF829
NR695	9803 North Millwork...	CS190
TH296	The Winchcombe Rail...	CS190
MM424	(im)Mortality	CW626

Are you using charts and graphs in Excel? Build charts and even more insightful visualizations with Tableau instead.

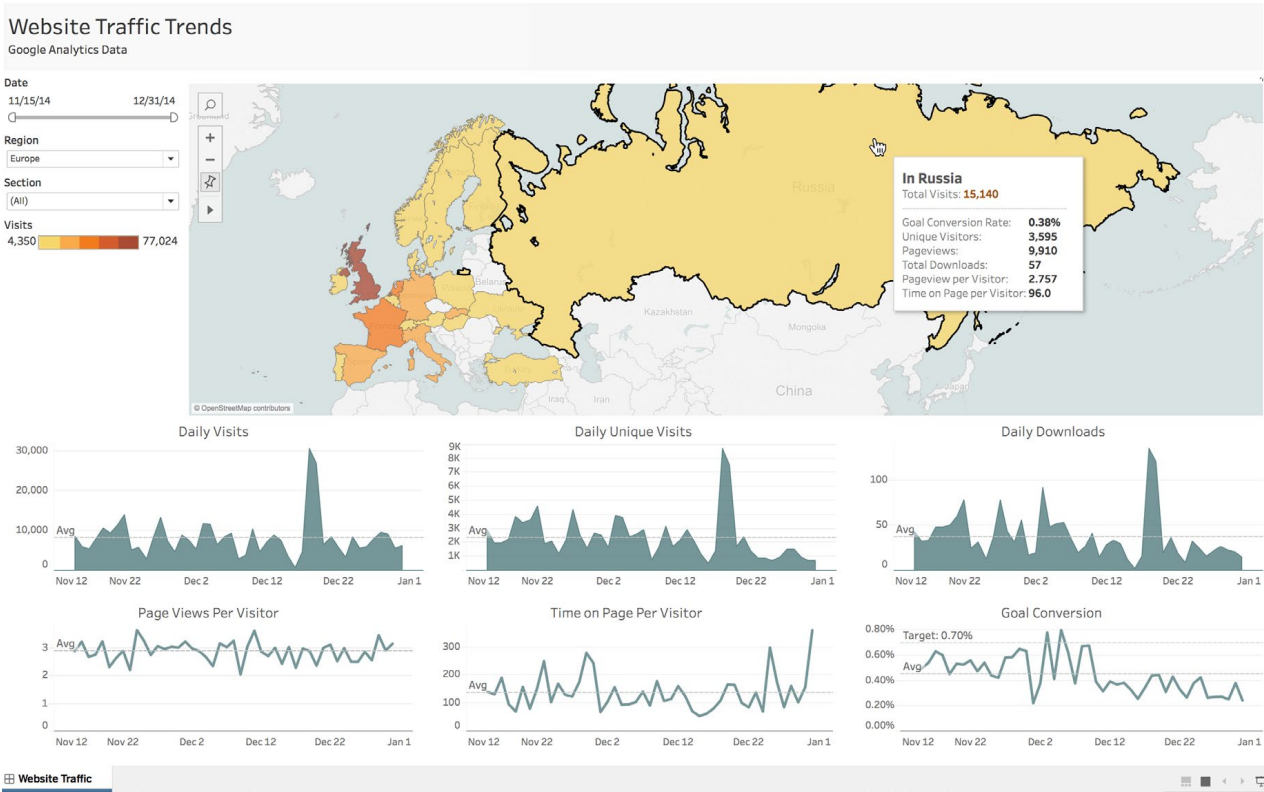
Like a good spreadsheet tool, Excel is oriented around numbers. Numbers are raw and straight to the point, but seeing rows in a spreadsheet isn't a very compelling way to dig into the data or present your analysis.

You trust the numbers, your boss trusts the numbers, and your boss's boss trusts the numbers. You can pivot your numbers to create charts that visually represent the results of your analysis, but asking follow-up questions is where a tool like Excel can fall short.

In Excel, you need to have a reasonable idea about the answers to your questions before deciding which chart best displays your analysis results. Who has this level of foresight for all types of analysis? Even after you think you've made the right decision about which chart to use, the data might have changed. There might be additional information available to help with your analysis. Perhaps the results of your chart don't look the way you expect or answer the question properly. In cases like this, you often have to start over.

Tableau moves beyond static charts by making your analytics visual, facilitating a more holistic view of your data. You can effortlessly adjust your data visualizations so you can freely explore each angle—without needing to be intimately familiar with spreadsheet-level details or complicated analyses.

Ultimately, your data informs the best chart and graph choices—not the other way around. Tableau visualizations, loved by academics and business professionals alike, are optimized to handle new and changing data. They naturally promote fresh and relevant visualizations. By emphasizing the analysis rather than the chart to display your results, you can focus less on predicting the answers and focus more on asking the right questions.



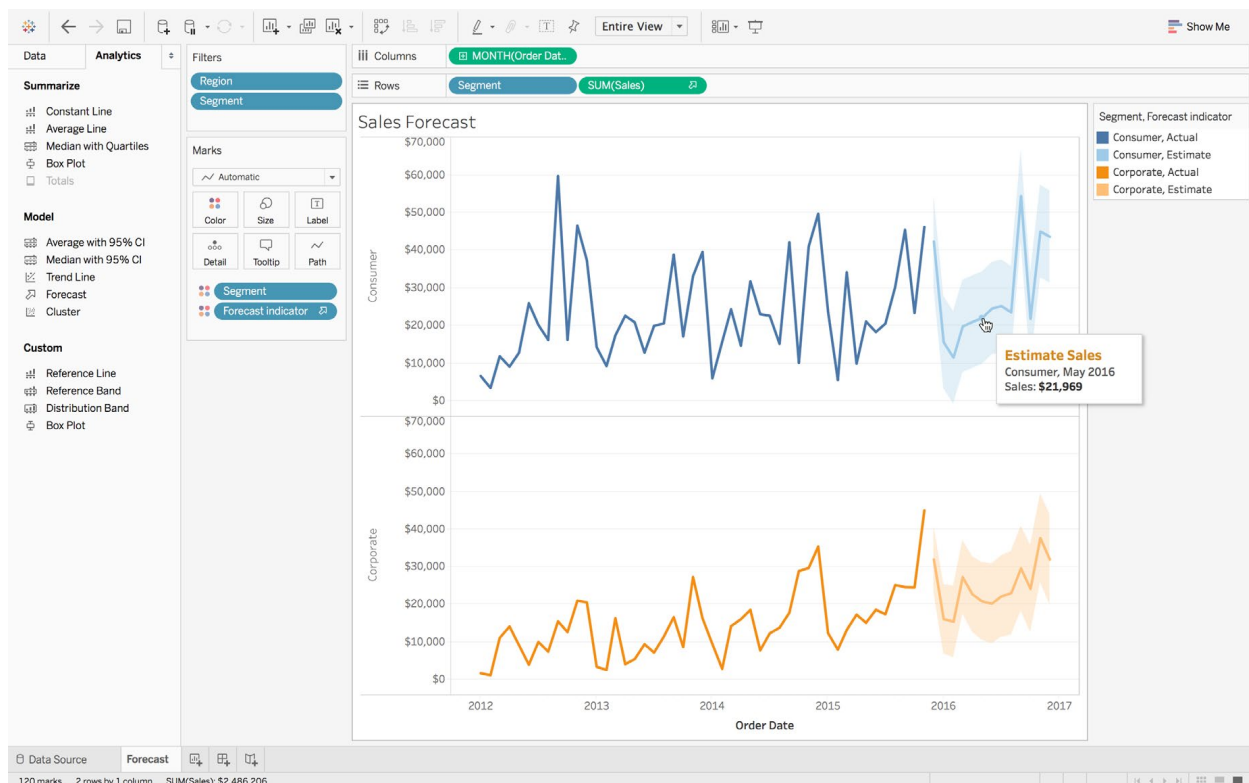
Using Excel for calcs?

Try Tableau for calculations and even richer analytics.

You can use Excel's formulas and functions, like LOOKUP or SUM, to perform many calculations on your data. And while it's important that these tasks be convenient, you might find yourself needing to take your analysis to the next level—and fast.

In addition to a smart calculation language, Tableau has built-in features to help get your data in a structure and format you and others can use. These analytics enable at-will data exploration. Quickly reveal and isolate outliers, discover hidden patterns, show geographical locations, see trends, and model the future so you can anticipate results.

With Tableau, you can analyze your data without worrying about your data becoming corrupt or losing weeks or months of work because someone accidentally deleted one of your formulas. Your data is safe because it never writes back to your original data source. Tableau lets you find every angle of inquiry, effortlessly and organically asking questions and letting the answers lead you to new and amazing insights.

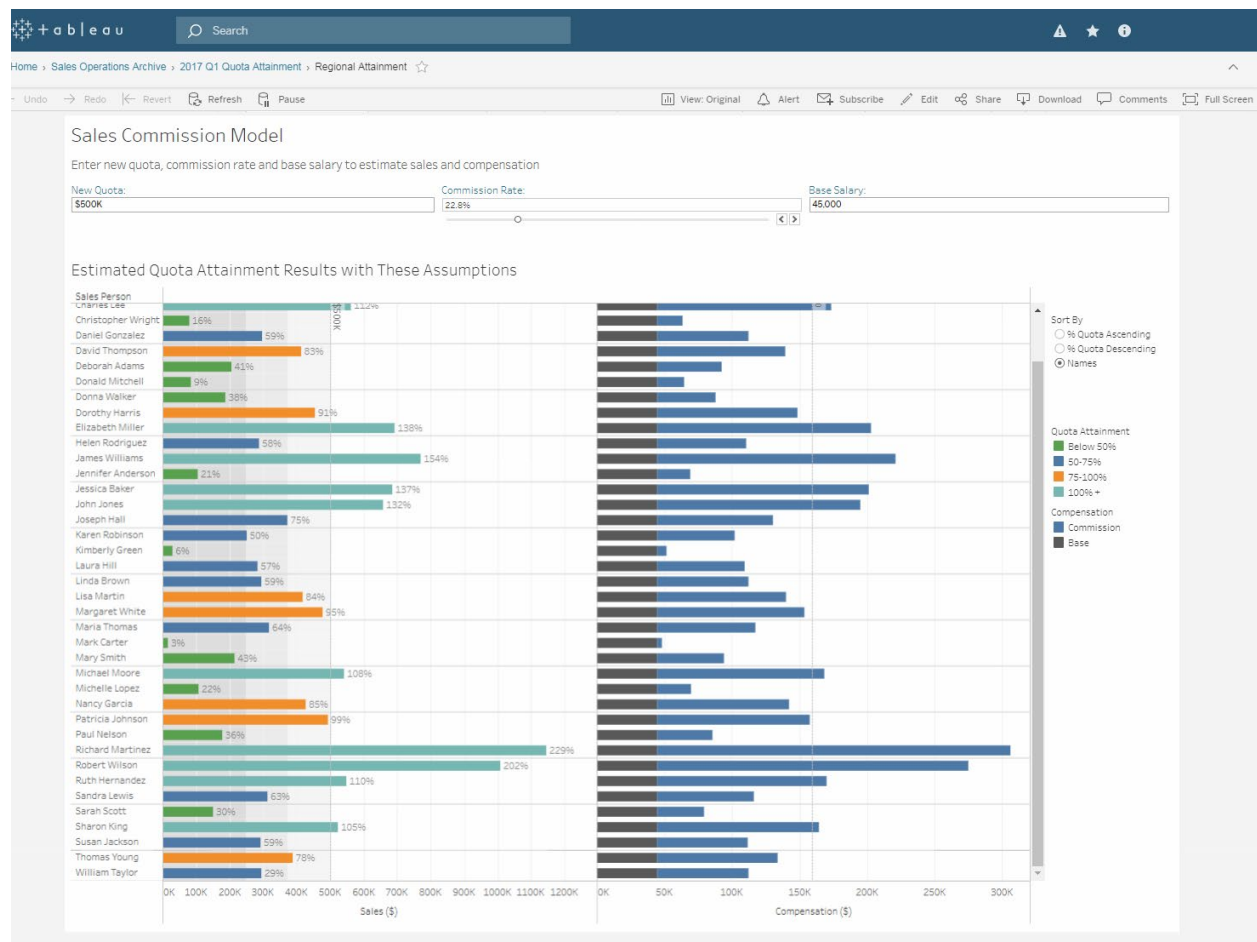


Sharing Excel reports?

Try sharing and collaborative exploration with Tableau.

When it comes time to share your analysis results in Excel with others, you can share a physical report or PDF. But what if you want to allow others to ask follow-up questions and interact with the data? Sharing or inviting others to collaborate on your Excel spreadsheets requires a level of additional configuration, precautions, and sometimes even third-party plugins.

With Tableau, collaboration is built-in as an integral step in your organization's cycle of analytics. There are no additional configurations or add-ons required to share or collaborate with data. With Tableau Server and Tableau Online, your data is centrally available on the web. Simply publish and share visualizations and dashboards with the people you want to collaborate with.



Conclusion

Using Excel and Tableau together takes your data analysis to the next level. Free yourself from the restrictions of static spreadsheets and charts, and discover a whole new world of data exploration, insights, and interactivity that empowers everyone to create conversations with data.

If you're storing your data in Excel, try Tableau to bring it all together. When you struggle choosing charts and graphs, build insightful, interactive visualizations in Tableau instead. If you're tired of writing calcs, try Tableau's drag-and-drop analytics to answer more in-depth questions. Rather than sending reports, up your game by collaborating, iterating, and exploring shared data and dashboards with Tableau.

Whether you're answering a quick question, collaborating with others, or even making analysis available to the entire business, Tableau gives you the power to make an impact with your data.

[Download a free trial](#) today or check out all of the products that Tableau has to offer.

About Tableau, a Salesforce Company

Tableau helps people see and understand data. As the world's leading analytics platform, Tableau offers visual analytics with powerful AI, data management and collaboration. From individuals to organizations of all sizes, customers around the world love using Tableau's advanced analytics to fuel impactful, data-driven decisions. For more information, please visit www.tableau.com

Additional resources

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