CVDACTION dashboard resource edit guide

Introduction

This document provides a step-by-step guide on how to edit the Tableau and PowerBI CVDACTION dashboard templates to include hyperlinks to additional resources, such as local guidance.

Preparation

Before making changes to the dashboard files, please complete these steps:

1. Open the 'CVDACTION links' excel file included in the provided source files and create new rows to add the additional necessary hyperlinks to the file. Make sure the added hyperlink is included in the correct dashboard page, noted in column A, and that the 'Link Sort' number in column B corresponds to where the hyperlink should appear in the table on the dashboard page.
2. Close and save the excel document, making a note of the save location.

Tableau Dashboard

1. Open the CVDACTION packaged workbook in Tableau desktop.
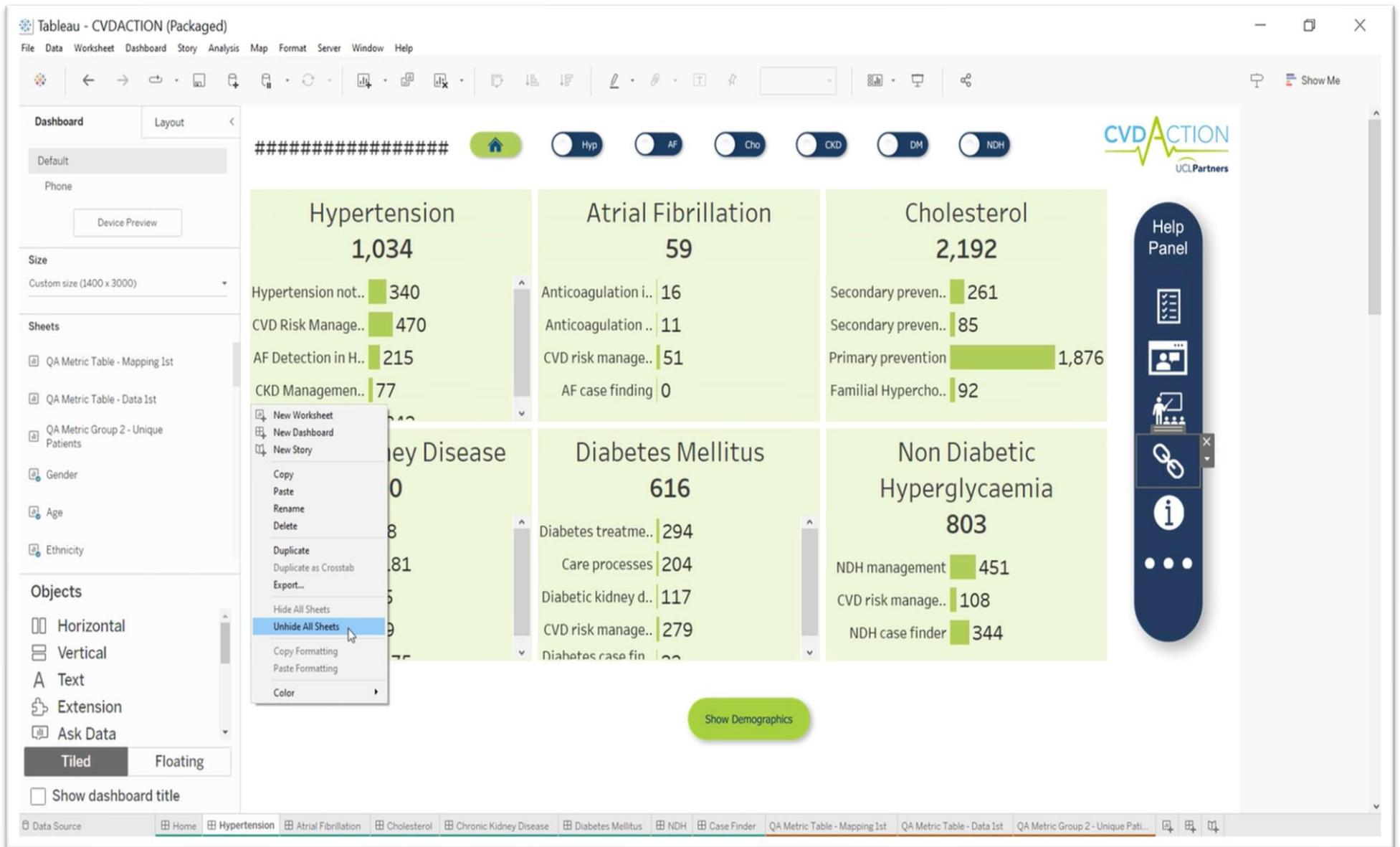
2. Select which dashboard page you want to add hyperlinks to at the bottom of the window, right click, and select 'Unhide All Sheets'.

3. In the newly expanded options, navigate to and select the sheet labelled 'links'.

4. Click 'Data Source' in the bottom left corner of the window.

5. Find the correct source file in the connections pane on the left-hand side of the screen, right click, and select 'Edit Connection'.

6. In the pop-up window, navigate to the 'CVDACTION links' excel file that was edited and saved earlier, click 'open'. The dashboard will automatically refresh to include the new links in the table.

7. To make sure the links appear in the correct table, click the 'Dashboard Filter' drop down menu on the right hand side of the window, and select the dashboard page you have just edited. The new links should now appear in the table.

8. Right click the same dashboard page you selected previously and click 'Hide All Sheets'.
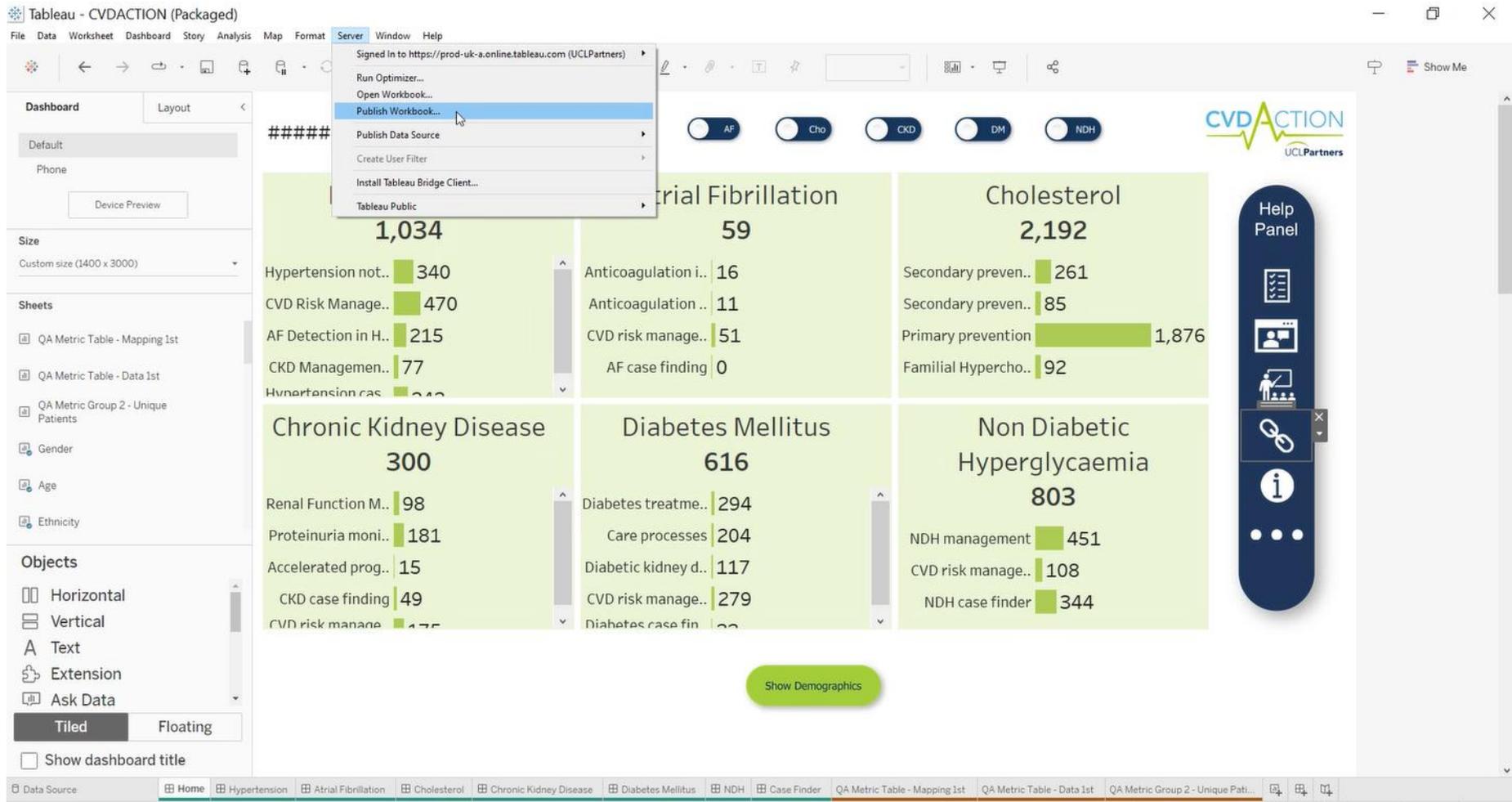
9. Navigate back to the CVDACTION home page then select Server in the ribbon at the top of the window and click 'Publish Workbook'

PowerBI

1. Open the CVDACTION PowerBI dashboard file.
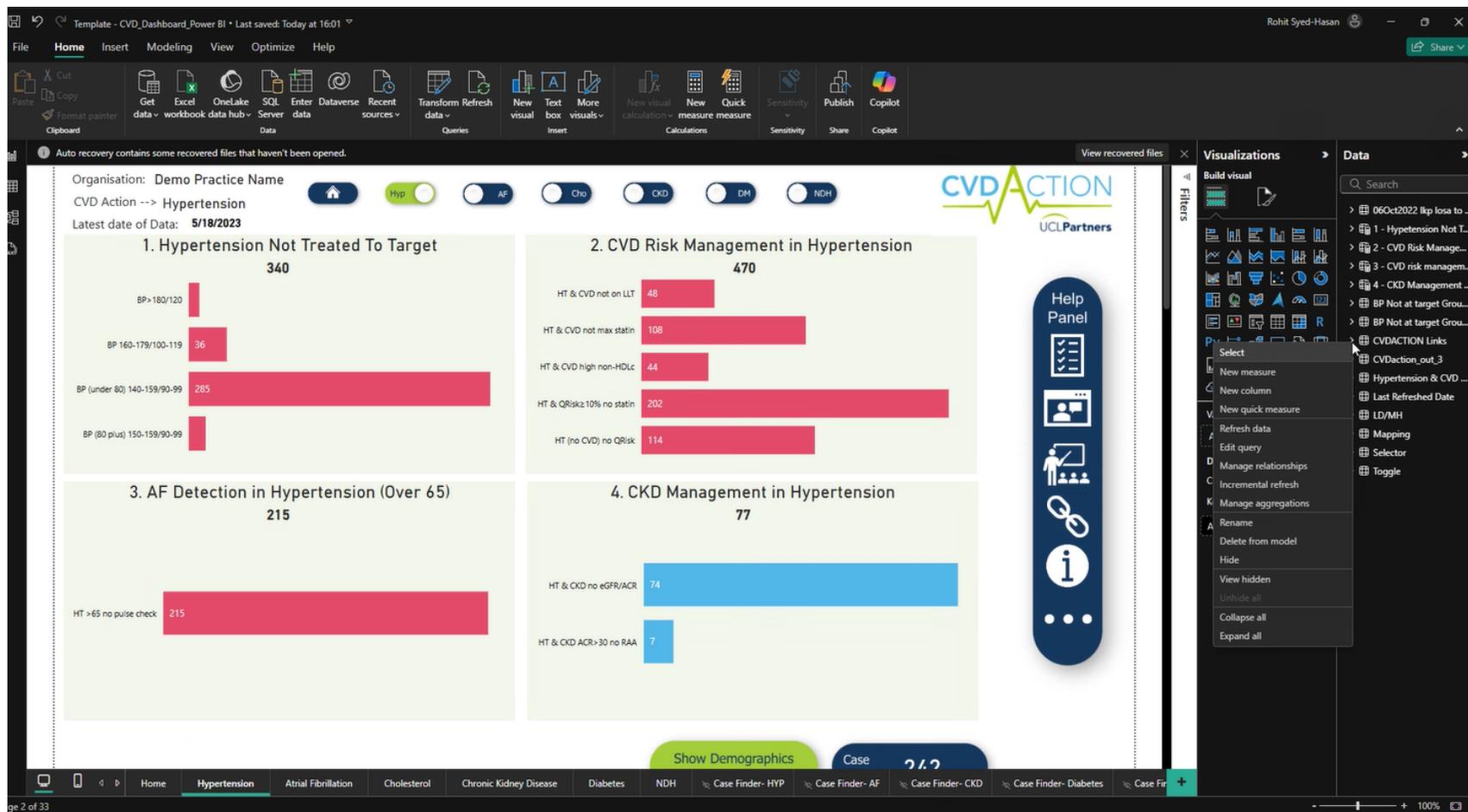
2. Navigate to the 'CVDACTION Links' option in the data pane on the right-hand side of the window, right click, and select 'edit query'.

3. Select 'CVDACTION Links' in the queries pane on the left-hand side of the window, then click 'Data source settings' in the ribbon at the top.

4. Select 'CVDACTION links' file and click 'Change Source' at the bottom of the pop-up window.
5. In the following pop-up window, navigate to the 'CVDACTION links' excel file that was edited and saved earlier. Click open and then click okay. Then click close on the pop-up window.

6. Click 'close and apply' in the ribbon at the top of the window.