

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.

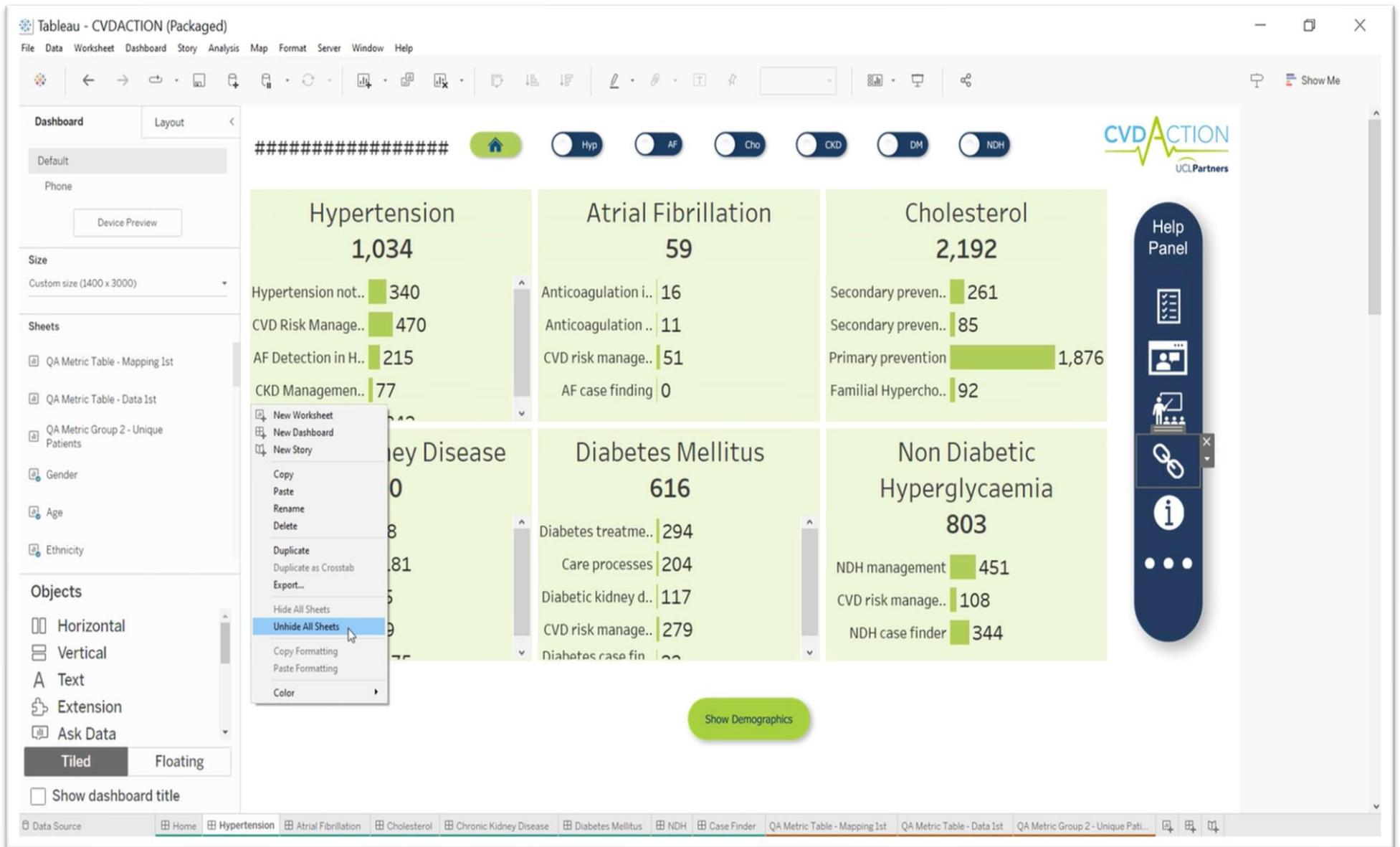
Preparation

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'.

Tableau - CVDACTION (Packaged)

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

UCLPartners

Category	Total
Hypertension	1,034
Hypertension not treated to target	340
CVD Risk Management	470
AF Detection in Hypertension	215
CKD Management	77
Hypertension case finding	212
Chronic Kidney Disease	300
Renal Function Monitoring	98
Proteinuria monitoring	181
Accelerated progression	15
CKD case finding	49
CVD risk management	177
Atrial Fibrillation	59
Anticoagulation in AF	16
Anticoagulation in Hypertension	11
CVD risk management	51
AF case finding	0
Cholesterol	2,192
Secondary prevention	261
Secondary prevention	85
Primary prevention	1,876
Familial Hypercholesterolaemia	92
Diabetes Mellitus	616
Diabetes treatment	294
Care processes	204
Diabetic kidney disease	117
CVD risk management	279
Diabetes case finding	92
Non Diabetic Hyperglycaemia	803
NDH management	451
CVD risk management	108
NDH case finder	344

Show Demographics

Help Panel

- Home
- Dashboard
- Worksheet
- Story
- Help

Links

- CVDprevent - national audit of CVD prevention in primary care
- CVDACTION Next Steps to Improve Care and Outcomes:
- UCLPartners Resource for Proactive Care Consultations:
- UCLPartners CVDACTION example

Tableau Desktop interface showing various panels: Dashboard, Size (Custom size 1400 x 3000), Sheets (PDF Patient Tables, Gender, Age, Ethnicity), Objects (Horizontal, Vertical, Text, Extension, Ask Data), and Tiled/Floating options.

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

The screenshot shows the Tableau Desktop interface for a dashboard titled "References and Links for Home:". The dashboard features a table with the following data:

Link text	URL	
CVDprevent - national audit of CVD prevention in primary care:	https://www.cvdprevent.nhs.uk/home	
CVDAction Next Steps to Improve Care and Outcomes:	https://uclpartners.com/wp-content/uploads/UCLP-CVDAction-Clinical-Next-Steps-..	
UCLPartners Resource for Proactive Care Consultations:	https://s42140.pcdn.co/wp-content/uploads/UCLP-Proactive-Care-Consultations-G..	
UCLPartners CVDAction example	CVDAction Tableau Public	

The Tableau interface includes a menu bar (File, Data, Worksheet, Dashboard, Story, Analysis, Map, Format, Server, Window, Help), a toolbar with navigation and editing tools, and a sidebar with a folder tree and a marks card. The folder tree shows a hierarchy of folders including Demographics, Indicators, Organisation, Patient Details, and System. The marks card shows a "True" filter and a "Shape" dropdown menu.

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

Tableau - CVDACTION (Packaged)

File Data Server Window Help

CVDACTION Data + Mapping

Connection: Live Extract Filters: 0 | Add

Connections: CVDACTION (Text file), Mapping (Microsoft Excel), CVDACTION Links (Microsoft Excel)

Sheets: CVDACTION Links, New Union, New Table Extension

Diagram: CVDACTION (Venn diagram icon) — Mapping — CVDACTION Links

Context Menu: Edit Connection..., Rename, Remove

Tableau View: CVDACTION (25 fields, 7129 rows)

Name	Uniquelidentifier	Practice Name	ICB Name	PCN Name	Fir
CVDACTION	fb68f1354df454b34d3a	Demo Practice Name	ICB1	PCN1	B
	91a3c388dc7b448b8a89	Demo Practice Name	ICB2	PCN2	Jt
	13c87900e2a203c0fa0c	Demo Practice Name	ICB2	PCN2	D
	39ce93452853a404bc3f	Demo Practice Name	ICB2	PCN2	El
	10f8872f225829d91b38	Demo Practice Name	ICB2	PCN2	L

Fields Table:

Type	Field Name	Physical Ta...	Rem...
Abc	Uniquelidentifier	CVDACTION...	Uniqu...

Data Source: Home, Hypertension, ^1 PDF - Patient Table - Header ..., ^2 PDF Patient Table - Header R..., ^3 PDF Patient Table, Gender, Age, Ethnicity, Deprivation (IMD quintile), Demographics - SMI / LD, Demographics - SMI, 1. Hypertension Not Treated to T..., 2. CVD Risk Managei

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

- 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.

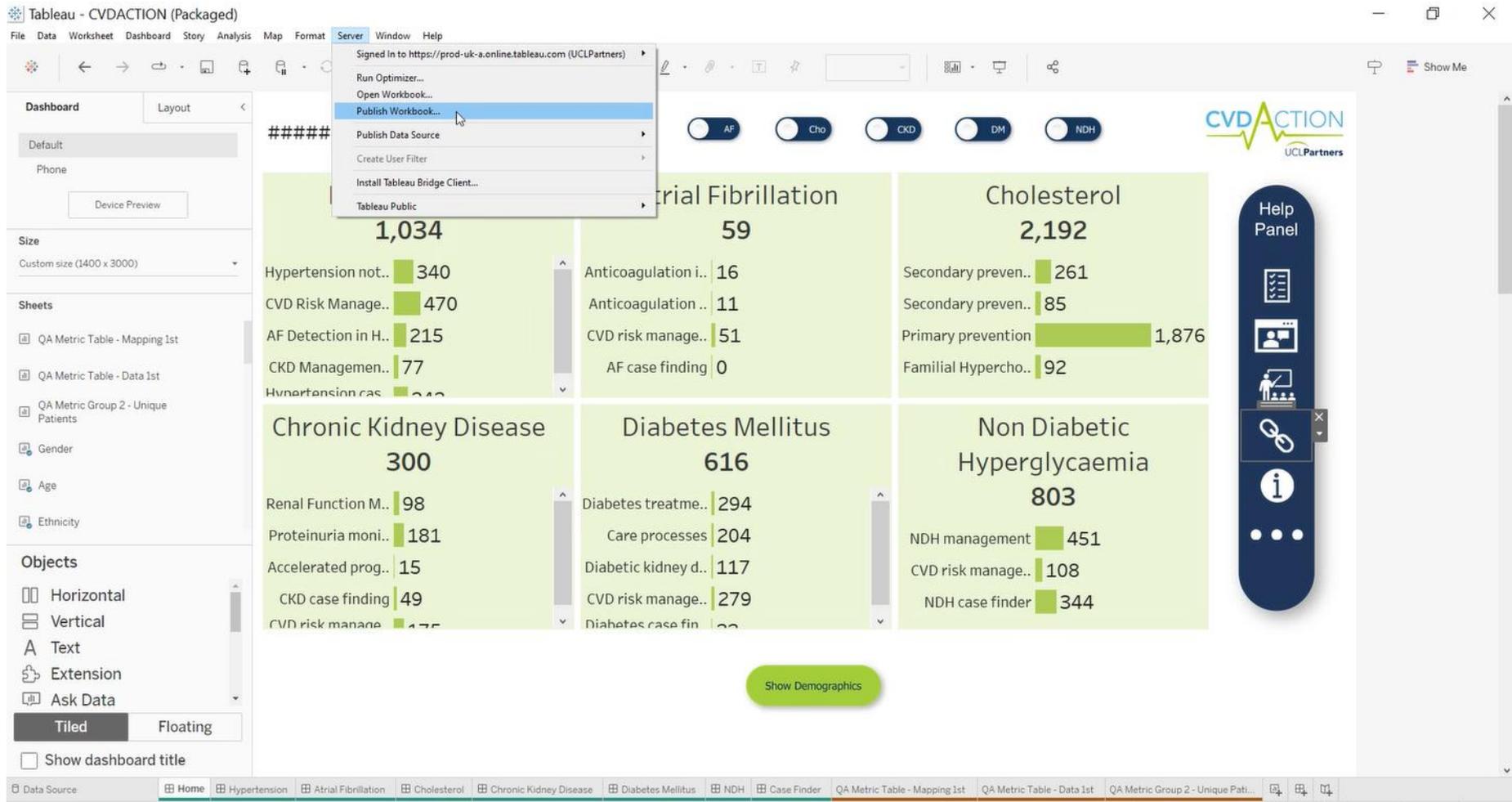
The screenshot shows the Tableau interface with a dashboard titled "References and Links for Hypertension:". The dashboard features a table with the following data:

Link text	URL	Icon
UCLPartners Hypertension Resource for Clinicians:	https://uclpartners.com/wp-content/uploads/CVDACTION-Hypertension-270323.p...	🔗
UCLPartners Resource for Proactive Care Consultations:	https://s42140.pcdn.co/wp-content/uploads/UCLP-Proactive-Care-Consultations-G...	🔗
NICE Clinical Guideline NG136 (Hypertension):	https://www.nice.org.uk/guidance/ng136	🔗

A 'Dashboard Filter' dropdown menu is open on the right side of the dashboard, showing a list of conditions. The 'Hypertension' option is selected, and the list includes: Hypertension, Atrial Fibrillation, Cholesterol, Chronic Kidney Disease, Diabetes Mellitus, Non Diabetic Hyperglycaemia Home, Hypertension case finding, AF case finding, CKD case finding, Diabetes case finder, and NDH case finder.

- 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.

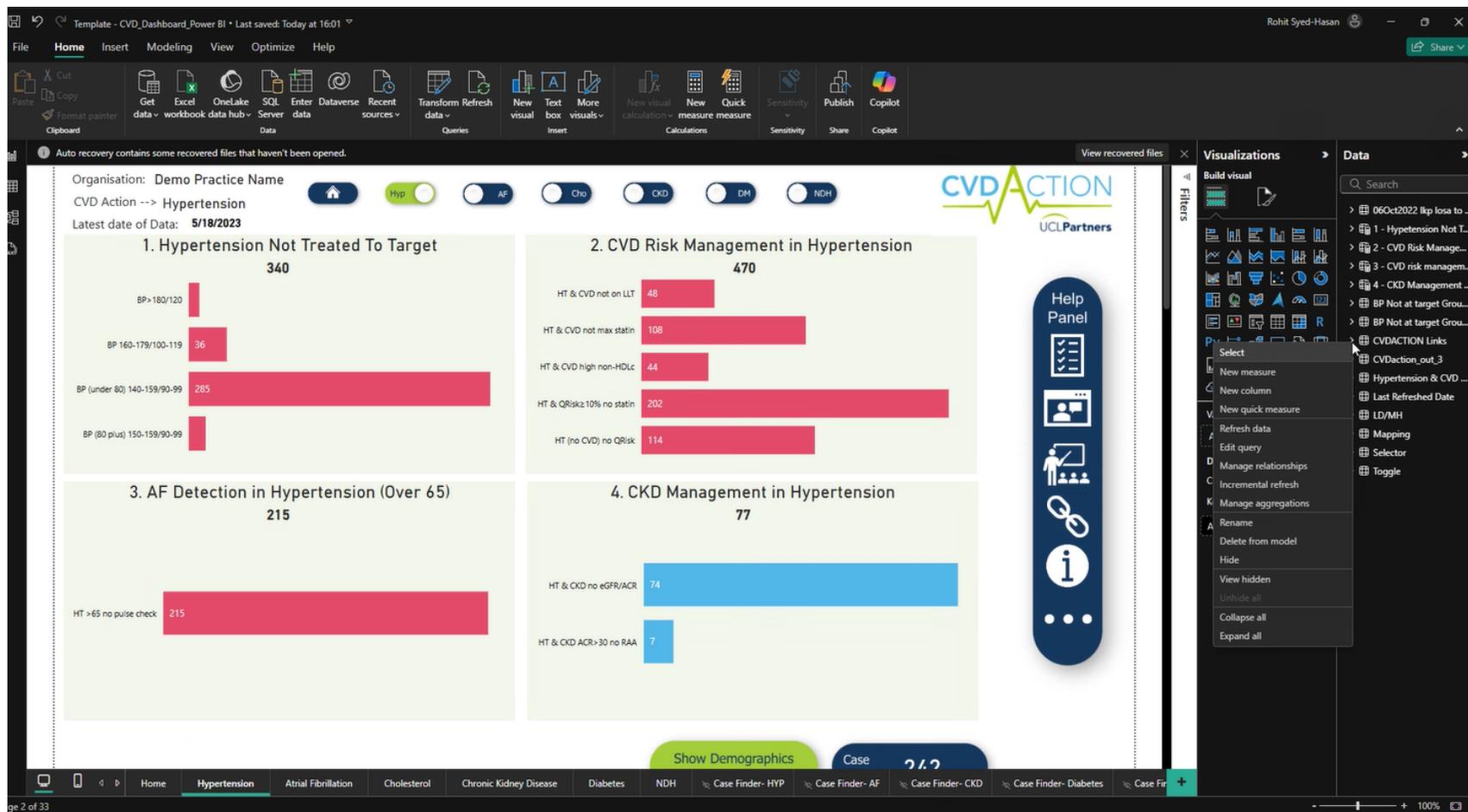
8. Right click the same dashboard page you selected previously and click 'Hide All Sheets'.



9. Navigate back to the CVD ACTION 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'.

Template - CVD_Dashboard_Power BI

Home Transform Add Column View Tools Help

Close & Apply - New Source - Recent Sources - Enter Data - Data source setting - Manage Parameters - Refresh Preview - Advanced Editor - Manage - Properties - Choose Columns - Remove Columns - Keep Rows - Remove Rows - Sort - Split Column - Group By - Use First Row as Headers - Replace Values - Merge Queries - Append Queries - Combine Files - Text Analytics - Vision - Azure Machine Learning - AI Insights

Queries [1]

Table.RenameColumns(#"Duplicated Column",{"URL - Copy", "Link"})

Dashboard	Link Sort	Link text	URL	Link
1	Home	1 CVDprevent - national audit of CVD prevention in primary care:	https://www.cvdprevent.nhs.uk/home	https://www.cvdprevent.nhs.uk/home
2	Home	2 CVDAction Next Steps to Improve Care and Outcomes:	https://uclpartners.com/wp-content/uploads/UCLP-CVDAction-Clinica...	https://uclpartners.com/wp-content/uploads/UCLP-CVDAction-Clinica...
3	Home	3 UCLPartners Resource for Proactive Care Consultations:	https://s42140.pcdn.co/wp-content/uploads/UCLP-Proactive-Care-Co...	https://s42140.pcdn.co/wp-content/uploads/UCLP-Proactive-Care-Co...
4	Hypertension	4 UCLP PBI	https://public.tableau.com/app/profile/vizdj.com/viz/CVDActionTPV...	https://public.tableau.com/app/profile/vizdj.com/viz/CVDActionTPV...
5	Hypertension	5 UCLPartners Hypertension Resource for Clinicians:	https://uclpartners.com/wp-content/uploads/CVDAction-Hypertensi...	https://uclpartners.com/wp-content/uploads/CVDAction-Hypertensi...
6	Hypertension	6 UCLPartners Resource for Proactive Care Consultations:	https://s42140.pcdn.co/wp-content/uploads/UCLP-Proactive-Care-Co...	https://s42140.pcdn.co/wp-content/uploads/UCLP-Proactive-Care-Co...
7	Hypertension	7 NICE Clinical Guideline NG136 (Hypertension):	https://www.nice.org.uk/guidance/ng136	https://www.nice.org.uk/guidance/ng136
8	Atrial Fibrillation	8 UCLPartners Atrial Fibrillation Resource for Clinicians:	http://uclpartners.com/wp-content/uploads/CVDAction-AF-270323-...	http://uclpartners.com/wp-content/uploads/CVDAction-AF-270323-...
9	Atrial Fibrillation	9 UCLPartners Resource for Proactive Care Consultations:	https://s42140.pcdn.co/wp-content/uploads/UCLP-Proactive-Care-Co...	https://s42140.pcdn.co/wp-content/uploads/UCLP-Proactive-Care-Co...
10	Atrial Fibrillation	10 NICE Guideline NG196 (AF):	https://www.nice.org.uk/guidance/ng196	https://www.nice.org.uk/guidance/ng196
11	Cholesterol	11 UCLPartners Cholesterol Resource for Clinicians:	http://uclpartners.com/wp-content/uploads/CVDAction-Cholesterol...	http://uclpartners.com/wp-content/uploads/CVDAction-Cholesterol...
12	Cholesterol	12 UCLPartners Resource for Proactive Care Consultations:	https://s42140.pcdn.co/wp-content/uploads/UCLP-Proactive-Care-Co...	https://s42140.pcdn.co/wp-content/uploads/UCLP-Proactive-Care-Co...
13	Cholesterol	13 NICE Clinical Guideline CG181 (CVD risk):	https://www.nice.org.uk/guidance/cg181	https://www.nice.org.uk/guidance/cg181
14	Cholesterol	14 Nice Clinical Guideline CG71 (FH)	https://www.nice.org.uk/guidance/cg71	https://www.nice.org.uk/guidance/cg71
15	Chronic Kidney Disease	15 UCLPartners CKD Resource for Clinicians	https://uclpartners.com/wp-content/uploads/CVDAction-CKD-31052...	https://uclpartners.com/wp-content/uploads/CVDAction-CKD-31052...
16	Chronic Kidney Disease	16 UCLPartners Resource for Proactive Care Consultations:	https://s42140.pcdn.co/wp-content/uploads/UCLP-Proactive-Care-Co...	https://s42140.pcdn.co/wp-content/uploads/UCLP-Proactive-Care-Co...
17	Chronic Kidney Disease	17 NICE Guideline NG203 (CKD):	https://www.nice.org.uk/guidance/ng203	https://www.nice.org.uk/guidance/ng203
18	Chronic Kidney Disease	18 NICE Technology Appraisal TA775 (CKD):	https://www.nice.org.uk/guidance/ta775	https://www.nice.org.uk/guidance/ta775
19	Diabetes Mellitus	19 UCLPartners Diabetes Resource for Clinicians:	http://uclpartners.com/wp-content/uploads/CVDAction-Diabetes-27...	http://uclpartners.com/wp-content/uploads/CVDAction-Diabetes-27...
20	Diabetes Mellitus	20 UCLPartners Resource for Proactive Care Consultations:	https://s42140.pcdn.co/wp-content/uploads/UCLP-Proactive-Care-Co...	https://s42140.pcdn.co/wp-content/uploads/UCLP-Proactive-Care-Co...
21	Diabetes Mellitus	21 NICE Clinical Guideline NG28 (Type 2 Diabetes):	https://www.nice.org.uk/guidance/ng28	https://www.nice.org.uk/guidance/ng28
22	Non Diabetic Hyperglycaemia	22 UCLPartners Resource for Proactive Care Consultations:	https://s42140.pcdn.co/wp-content/uploads/UCLP-Proactive-Care-Co...	https://s42140.pcdn.co/wp-content/uploads/UCLP-Proactive-Care-Co...
23	Non Diabetic Hyperglycaemia	23 NICE Public Health Guideline PH38 (NDH):	https://www.nice.org.uk/guidance/ph38/	https://www.nice.org.uk/guidance/ph38/

5 COLUMNS, 23 ROWS Column profiling based on top 1000 rows

PREVIEW DOWNLOADED AT 4:11 PM

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.

The screenshot shows the Power BI Desktop interface. A 'Data source settings' dialog box is open, displaying a list of data sources. The selected source is 'c:\users\shreya satish\baseone...s\vizdj\work\data\cvdaction links.xlsx'. The 'Change Source...' button is highlighted with a mouse cursor. The background shows a table with columns like 'Link Sort' and 'Link'.

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

Template - CVD_Dashboard_Power BI

Home Transform Add Column View Tools Help

Close & Apply New Source Recent Sources Enter Data Data source settings Manage Parameters Refresh Preview Advanced Editor Choose Columns Remove Columns Keep Rows Remove Rows Split Column Group By Data Type: Text Use First Row as Headers Replace Values Merge Queries Append Queries Combine Files Text Analytics Vision Azure Machine Learning

Close the Query Editor window and apply any pending changes. Parameters Query Manage Columns Reduce Rows Sort Transform Combine AI Insights

Queries [11]

Table.RenameColumns(#"Duplicated Column",{"URL - Copy", "Link"})

1	Dashboard	Link Sort	Link text	URL	Link
1	Home		CVDprevent - national audit of CVD prevention in primary care:	https://www.cvdprevent.nhs.uk/home	https://www.cvdprevent.nhs.uk/home
2	Home		CVDAction Next Steps to Improve Care and Outcomes:	https://uclpartners.com/wp-content/uploads/UCLP-CVDAction-Clinica...	https://uclpartners.com/wp-content/uploads/UCLP-CVDAction-Clinica...
3	Home		UCLPartners Resource for Proactive Care Consultations:	https://s42140.pcdn.co/wp-content/uploads/UCLP-Proactive-Care-Co...	https://s42140.pcdn.co/wp-content/uploads/UCLP-Proactive-Care-Co...
4	Hypertension		UCLP PBI	https://public.tableau.com/app/profile/vizdj.com/viz/CVDACTIONTPV...	https://public.tableau.com/app/profile/vizdj.com/viz/CVDACTIONTPV...
5	Hypertension		UCLPartners Hypertension Resource for Clinicians:	https://uclpartners.com/wp-content/uploads/CVDAction-Hypertensi...	https://uclpartners.com/wp-content/uploads/CVDAction-Hypertensi...
6	Hypertension		UCLPartners Resource for Proactive Care Consultations:	https://s42140.pcdn.co/wp-content/uploads/UCLP-Proactive-Care-Co...	https://s42140.pcdn.co/wp-content/uploads/UCLP-Proactive-Care-Co...
7	Hypertension		NICE Clinical Guideline NG136 (Hypertension):	https://www.nice.org.uk/guidance/ng136	https://www.nice.org.uk/guidance/ng136
8	Atrial Fibrillation		UCLPartners Atrial Fibrillation Resource for Clinicians:	http://uclpartners.com/wp-content/uploads/CVDAction-AF-270323-...	http://uclpartners.com/wp-content/uploads/CVDAction-AF-270323-...
9	Atrial Fibrillation		UCLPartners Resource for Proactive Care Consultations:	https://s42140.pcdn.co/wp-content/uploads/UCLP-Proactive-Care-Co...	https://s42140.pcdn.co/wp-content/uploads/UCLP-Proactive-Care-Co...
10	Atrial Fibrillation		NICE Guideline NG196 (AF):	https://www.nice.org.uk/guidance/ng196	https://www.nice.org.uk/guidance/ng196
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12	Cholesterol		UCLPartners Resource for Proactive Care Consultations:	https://s42140.pcdn.co/wp-content/uploads/UCLP-Proactive-Care-Co...	https://s42140.pcdn.co/wp-content/uploads/UCLP-Proactive-Care-Co...
13	Cholesterol		NICE Clinical Guideline CG181 (CVD risk):	https://www.nice.org.uk/guidance/cg181	https://www.nice.org.uk/guidance/cg181
14	Cholesterol		Nice Clinical Guideline CG71 (FH)	https://www.nice.org.uk/guidance/cg71	https://www.nice.org.uk/guidance/cg71
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18	Chronic Kidney Disease		NICE Technology Appraisal TA775 (CKD):	https://www.nice.org.uk/guidance/ta775	https://www.nice.org.uk/guidance/ta775
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22	Non Diabetic Hyperglycaemia		UCLPartners Resource for Proactive Care Consultations:	https://s42140.pcdn.co/wp-content/uploads/UCLP-Proactive-Care-Co...	https://s42140.pcdn.co/wp-content/uploads/UCLP-Proactive-Care-Co...
23	Non Diabetic Hyperglycaemia		NICE Public Health Guideline PH38 (NDH):	https://www.nice.org.uk/guidance/ph38/	https://www.nice.org.uk/guidance/ph38/

Query Settings

PROPERTIES

Name
CVDAction Links

APPLIED STEPS

- Source
- Navigation
- Promoted Headers
- Changed Type
- Duplicated Column
- Renamed Columns

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