TABLEAU CONFERENCE
Welcome
Authoring Navigation and External Resources in Dashboards

Rachel Boy
Senior Software Engineer
Tableau Software
Dashboard Objects
Actions

Actions let you create interactive relationships between data, dashboard objects, other workbook sheets, and the web.

- Filter 1 (generated)
  - Run On: Select
  - Source: Shipping (Ship...)
  - Fields: All

- Filter Details
  - Run On: Select
  - Source: Shipping (Ship...)
  - Fields: All

Add Action >
Navigation

Button Object

Go to Sheet Action

Filter Action

Hidden sheets
Unpublished sheets
URI Schemes

http://www.tableau.com
https://www.tableau.com
www.tableau.com

mailto:rboy@tableau.com

custom: data.for.my.custom.app

Open a web page
Send an email
Something else?
URLs

Image Object
Any whitelisted scheme

Web Page Object
Web pages only (http/https or no scheme)

Go to URL Action
Any whitelisted scheme

Always double check behavior when published!
Close the loop and light it up with the Dashboard Extensions and the Extensions API
Thursday | 10:45 – 11:45 am | MCCNO - L3 - 338

Extensions FOMO cure | Dashboard extensions to use today
Thursday | 11:45 – 12:15 | MCCNO - L1 - Data Village - Story Points Theater 4
Self-teaching dashboards | Building in instruction to complex dashboards

Thursday | 12:30-1:30pm | MCCNO - L2 - New Orleans Theater B
Thank you!
rboy@tableau.com
Please complete the session survey from the Session Details screen in your TC18 app.
TABLEAU
CONFERENCE
Appendix: making sure your web page object works  
Part 1

Potential issue: http/https mismatch
If your tableau server uses https://, then the web page object must also use https://.

What it looks like:
An error inside the web page object:

Because the server is running HTTPS, the URL for this web page object must be specified using https:// instead of http://
(http://www.wikipedia.com)

Unable to display web page object (URL must start with https://)
http://www.wikipedia.com

Recommendation:
Either use https://, or omit the scheme entirely. If you just use www.website.com, Tableau will pick the correct scheme for you.
Appendix: making sure your web page object works

Part 2

Potential issue: website doesn’t allow embedding

Some website don’t allow themselves to be embedded. On server, this means that we cannot embed them in your dashboard

What it looks like:
The web zone is blank.

If you open up the developer tools (from the browser menu in chrome, choose “More Tools”, then “Developer Tools”), you see this error:

![Error message](https://www.google.com/

Refused to display 'https://www.google.com/' in a frame because it set 'X-Frame-Options' to 'sameorigin'.

We cannot work around this – if a website won’t allow it, then we cannot embed it in your dashboard on the web.
Appendix: which URI schemes will work?

Some are always allowed (http, https, mailto…)
Some are never allowed (javascript…)

For everything else...

**On Desktop** we ask the user

**On Server** the server administrator must add it to the whitelist (see `vizqlserver.url_scheme_whitelist` at [https://onlinehelp.tableau.com/current/server/en-us/cli_configuration-set_tsm.htm](https://onlinehelp.tableau.com/current/server/en-us/cli_configuration-set_tsm.htm))

* **On Desktop**, URL actions that interact with a web page object (instead of a new tab) can only use http/https. **On Server**, non-http schemes may still work.
Appendix: loading links in external iframes

If you embed a dashboard in another page, you can cause the target of a URL action to appear in another iframe on that page, outside of your workbook, by using the :target query parameter in your URL action.

Example:

HTML

```html
<iframe name='framename'></iframe>
<viz embed code .../>
```

URL Action

```
website.com?:target=framename
```
Appendix: loading all links in the current tab

If you want all URL actions on a dashboard to open in the current tab, you can use the `:linktarget` query parameter in the URL of the dashboard.

If you are viewing the viz directly:
myserver.com/path/to/view?:embed=y&:linktarget=_self

If you are embedding the viz in another page:
myserver.com/path/to/view?:embed=y&:linktarget=_self will open in the iframe
myserver.com/path/to/view?:embed=y&:linktarget=_parent will open in the parent page
Appendix: substitution parameters

Substitution parameters let you construct URLs that change based on context.

Web page objects and image objects can insert:
- Current Sheet Name
- Current Workbook Name
- Full Name of whoever is viewing the workbook
- User Name of whoever is viewing the workbook

URL actions can also insert fields from the current data.

Ex) www.internalwebsite.com/user/<User Name>
   \[\rightarrow www.internalwebsite.com/user/rboy\] when rboy is viewing
   \[\rightarrow www.internalwebsite.com/user/jdoe\] when jdoe is viewing
Appendix: filter action navigation without tabs visible

With tabs visible: all navigation uses the same browser tab
Without tabs visible:
  Button Object, Go to Sheet Action: use the same browser tab
  Filter Action: uses a new browser tab

To make filter action navigation open in the same browser tab:

Option 1: Add a hidden button on the source sheet, pointing to the target sheet. (You can make it very small, or float it off of the dashboard so it doesn’t appear in viewing.)

Option 2: Follow the steps on the slide “Appendix: loading all links in the current tab”