



# CCIS Precertification in Salesforce External Dashboard User Guidance

---

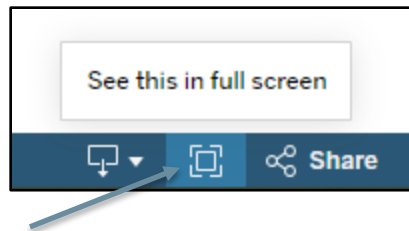
PEPS Division/Controls Center

05/01/2024 Version 1.1

---

This is a guidance document for the **Consultant Certification Information System (CCIS) Precertification in Salesforce** dashboard. This dashboard displays the firms that are actively pre-certified to work with TxDOT.

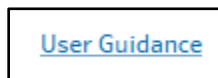
1. Bookmark this dashboard here:
  - CCIS Precertification Salesforce dashboard:  
<https://tableau.txdot.gov/views/CCISPrecertificationinSalesforceExternal/CCISPrecertificationinSalesforce>
2. Click **Full Screen** at the bottom right corner.



Hover over the **info icon** to see detailed notes. This will show the current data scope.



3. There is also a link to this User Guidance on the dashboard.

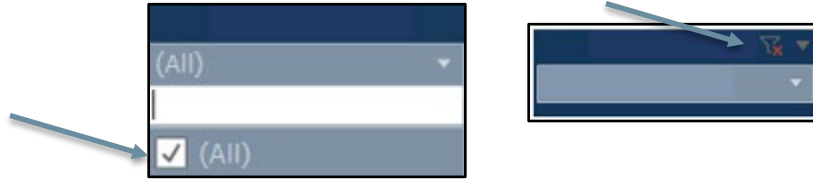


4. The large number summary at the top of the page, or **BAN**, displays the Count of Firms. The BAN will update its values when filters are applied.

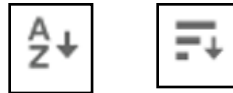


5. Use the **filters** to select and customize the view. This dashboard allows you to filter by Work Category, and Firm (Account) Name.
  - Filters have an autofill functionality. Once you begin to enter text in the search box the filtered list will update. You may check the desired filter from the list that appears. All filters have this functionality, and you may use more than one filter at a time.

- After making selections in the filter, click on any open white space in the dashboard to apply a selection.
- To clear a filter, you may check the **ALL** option or click on the **x** near the **funnel** icon.



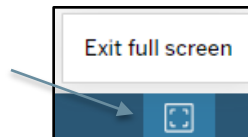
6. When hovering over a field name in the view, you may see sorting options. Sorting options are denoted with **A to Z** or **Z to A** for sorting by alphabetical in ascending or descending order.



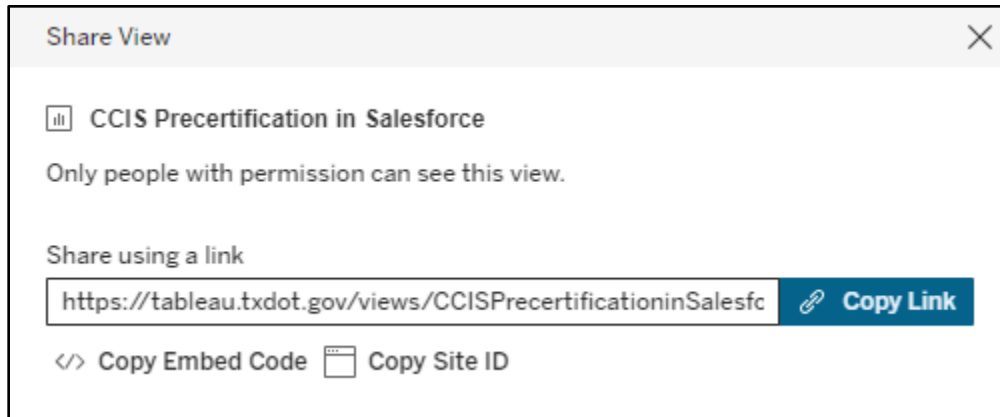
7. Drag the **gray bar** on the right-hand side of the page to scroll up and down.

Mailing State	Mailing Zip Code
TEXAS	78205
TEXAS	77094
TEXAS	77479
TEXAS	77077
TEXAS	78230
TEXAS	78758

8. Click **Exit Full Screen** at the bottom right corner or the **Esc** key at the top left of your keyboard to exit full screen.

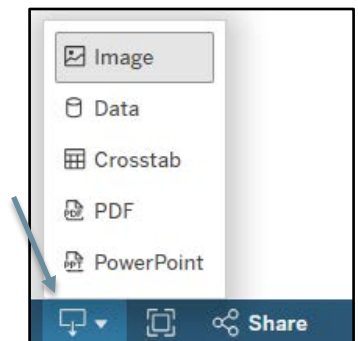


9. If you have applied certain filters and organized a view on the dashboard that you would like to share, you can click the **Share** button to send out the current dashboard view only to people who have permission by entering their name(s) in the window. You may also copy and paste the link to send it out.



10. To download the dataset, click on the **Download** button and select a format. Any filters, parameters, or selections currently applied in Tableau are reflected in the downloaded file.

- Enabled formats will be displayed and those that are disabled will be grayed out.
- If the **Data** option is grayed out, you must first click the specific sheet with data you want. Click inside a cell in the data view of your choice, wait for the blue highlight to appear. Click on the cell again to deselect it and retry the **Download** button.



- **Image:** Downloads an image of the view in .png format.
- **Data:** Opens a new tab in the browser window and displays the view's data in summary and detail. The data can be downloaded as a comma-separated value (.csv) file. If you require an .xlsx file, open the .csv file in Microsoft Excel and use the File>Save As function to update the file type.
- **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**, select the part of the workbook you want to download. Select this view, specific sheets from a workbook or dashboard, or select all. Select Scaling to control the image's appearance on the PDF. Select Paper Size and Orientation.

- 
- **PowerPoint:** Downloads selected sheets as images on individual slides in a PowerPoint presentation. For untabbed views, you can select only currently visible content. However, hidden sheets visible in a dashboard can be selected if you choose **Specific sheets from this workbook**. If you select a story sheet, all story points export as separate slides. The generated PPT will include a hyperlinked title slide and the date the file was generated.

11. For questions regarding precertification please contact [PEPS\\_CCIS\\_precert@txdot.gov](mailto:PEPS_CCIS_precert@txdot.gov). For questions regarding dashboard navigation and functionality please contact [PEPS\\_Controls\\_Center@txdot.gov](mailto:PEPS_Controls_Center@txdot.gov).

**Revision Log (Add Revision Log when User Guidance is updated)**

Version 1.1 (05.01.2024)	
Feature/Update	
Bookmarks	Dashboard link added, image removed.
Views	Removed from User Guidance.
Subscribe	Removed from User Guidance.
Tableau Server Interface Update	Updated BAN image, Enter/Exit Full Screen image, share image, and download image.