

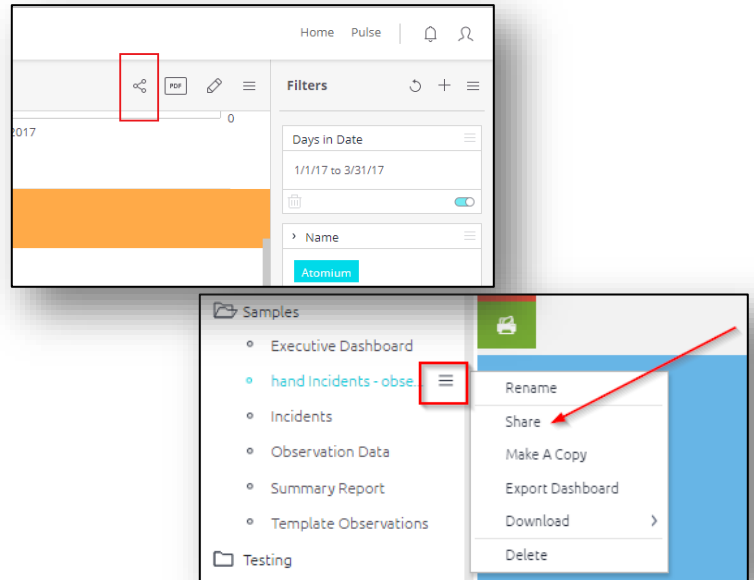
Sharing Dashboards

Administrators can share dashboards with other administrators and/or manager level users.



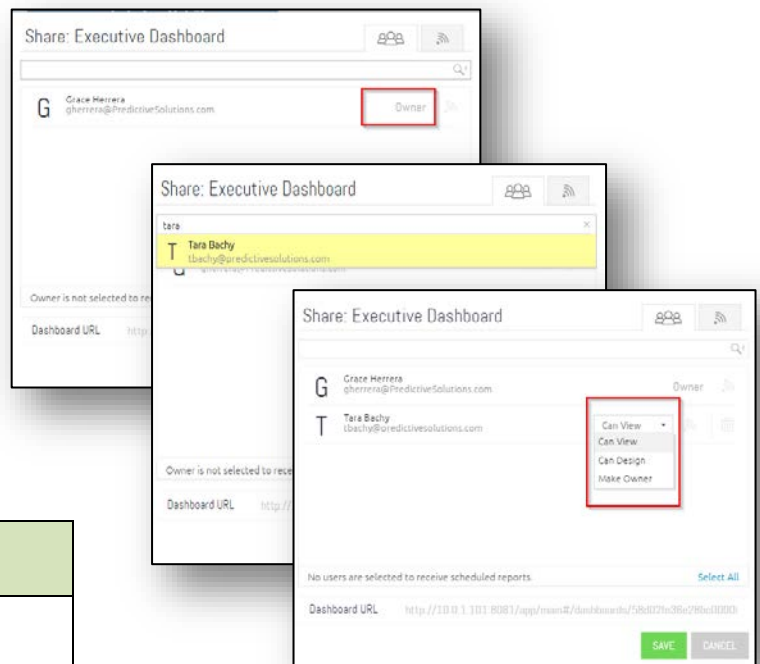
The share icon is located on the upper right hand of the dashboard.

Another option is to right click on the stacked menu icon located to the right of the dashboard title.



When you click on the Share icon you will see a window that allows you to type in the name of the recipient names OR you have the option to type the word "Group" to select all users in your account. Once the recipients are listed, you will have the option to give them editing permissions per user.

Below are the permission levels of a shared dashboard:

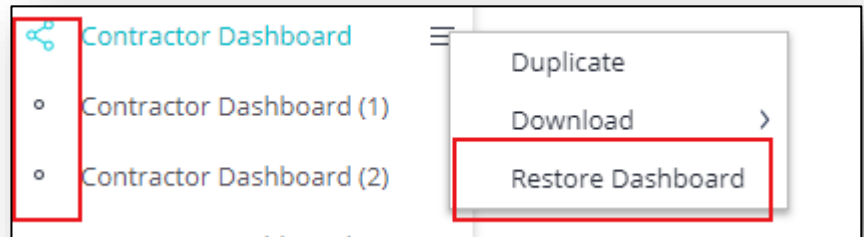


PERMISSION LEVEL	PERMISSION DETAILS
Can View	Ability to view and filter
Can Design	Ability to edit the dashboard to include widgets and filters.
Make Owner	Have full rights to the dashboard and maintains original copy

Working with Shared Dashboards

A dashboard recipient can edit the dashboard if you grant them permission, but the changes they make in the dashboard do not affect your copy of the dashboard. The recipient's changes are automatically performed on a separate copy of the dashboard (to which only they have access).

Dashboard recipients can revert to your latest shared copy at any time by right-clicking the dashboard's name in the Dashboards list on the left of the screen and selecting Restore Dashboard.



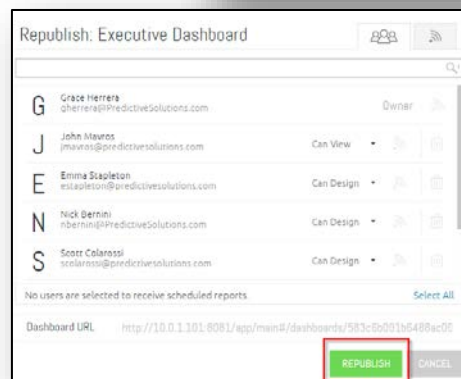
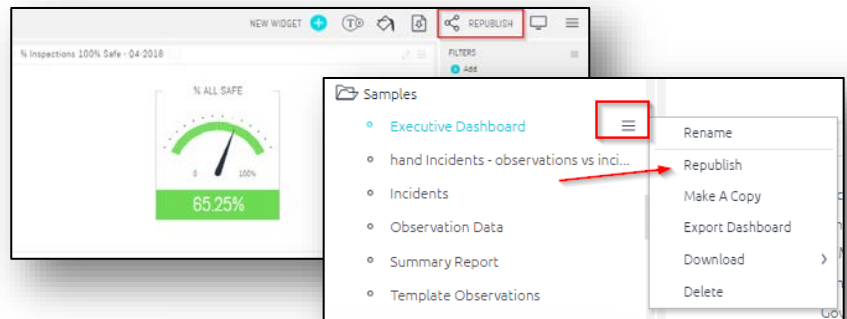
NOTE: When you share a dashboard that's contained within a folder, the dashboard is shared using the same structure (under the same folder). When a Designer shares a dashboard with you, you become a recipient and all the above applies to you.

Publishing Dashboards to Recipients

When an owner modifies a dashboard, for example, by adding a new widget, the dashboard is not automatically updated for recipients. The owner of a dashboard must publish their updated dashboard to update the dashboards of their recipients and the dashboard recipients must refresh the dashboard before any of the owner's changes are applied.

To publish a dashboard to your recipients:

In the heading of your dashboard, click **REPUBLISH**. **OR** In the Dashboards list, click on the stacked menu icon located to the right of the dashboard title click- **REPUBLISH**.



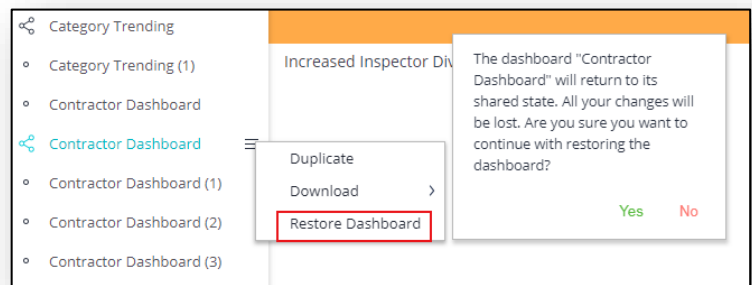
Updating a Shared Dashboard

When a recipient modifies a shared dashboard, those changes remain local unless the recipient updates their dashboard to match the dashboard of the owner. If the recipient updates their shared dashboard to match the dashboard of the owner, any of their local changes to the dashboard are overwritten. We recommend that recipients save any local versions of a shared dashboard as a new dashboard before updating a dashboard.

To update a shared dashboard:

In the Dashboards list, click on the stacked menu icon located to the right of the dashboard title click- Restore Dashboard.

Click YES to confirm that you want to update the shared dashboard.



Changing Ownership of a Dashboard

The owner of a dashboard can transfer ownership of the dashboard to another Administrator. Transferring ownership of dashboards can be useful when the original owner leaves your company and you do not want to lose their dashboards.

When you transfer ownership, the dashboard remains as a shared dashboard within your Dashboards list, and you become a dashboard recipient. As a dashboard recipient, you are limited to how you can modify the dashboard as described in Working with Shared Dashboards.

