

Sharing a Dashboard

11/13/2023 1:16 pm EST

Dashboards that you create are kept private by default and are only accessible to you. You can share any dashboard you create with other members of your InsightStore account. Sharing can be provided with either edit or read-only privileges.

Read-only access allows users to view the dashboard but does not allow them to modify or change the dashboard.

Edit access gives users full control over the dashboard, including the ability to modify, delete, and share the dashboard with other members of your account.

To share the dashboard, select the *Sharing* tab and either Read Only or Edit for each group or individual you wish to grant access to.

Basic Sharing Email

Dashboard Sharing

Dashboards can be shared with other users of your account. Users with *Read Only* access can view, but not edit, a dashboard. Users with *Edit* access can view the dashboard, share the dashboard with others, and make changes to the dashboard.

Name	No Access	Read Only	Edit
Everyone	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
CivicScientists	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Research & Success	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

On the *Email* tab, you can choose to have the dashboard emailed to you or to any member of your organization once or on a regular basis. *Note: You must first share the dashboard with the person or group to whom you want the dashboard emailed.*

Basic Sharing Email

Dashboard Email Settings

Have this dashboard emailed to you or other members of your account. Use the settings below to configure the frequency at which this dashboard should be emailed, and select the member that should receive the email.

WHEN SHOULD THIS EMAIL BE SENT?

- Never
- Immediately
- Daily
- Daily (Weekdays Only)
- Weekly
- Monthly

TO WHOM SHOULD THIS EMAIL BE SENT?

Name	Don't Send	Send
	<input checked="" type="radio"/>	<input type="radio"/>

