



D A M S T R A

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# Damstra Insights – Sharing a Dashboard

**PRODUCT:** Damstra Insights

**VERSION:**

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**APPROVED BY:**

## Sharing a Dashboard

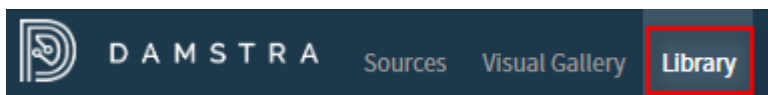
Allows customers to share dashboards they have created in Damstra Insights with colleagues. Share dashboards with groups or individual users. Sharing allows other users and groups to help maintain dashboards avoiding single author bottlenecks.

### Note:

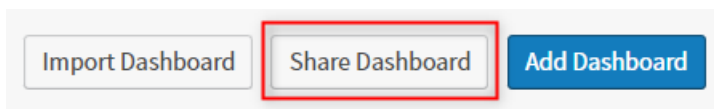
- a) Only users with “**Creator access**” can perform this action.
- b) Sharing feature allows only user-created dashboard to be shared.
- c) The sharing feature in Damstra Insights sets access not only at dashboard level but also at child visualizations.

### How to share a Dashboard?

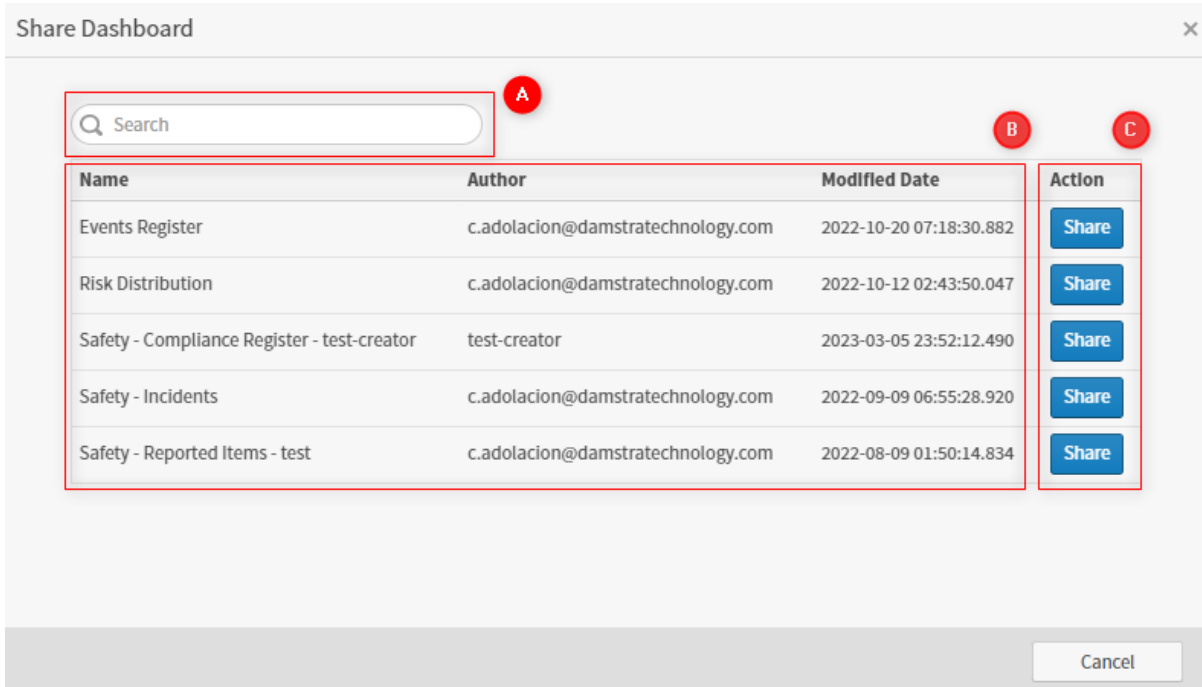
1. Open the “**Library**” from the menu.



2. Click the “**Share Dashboard**” button.

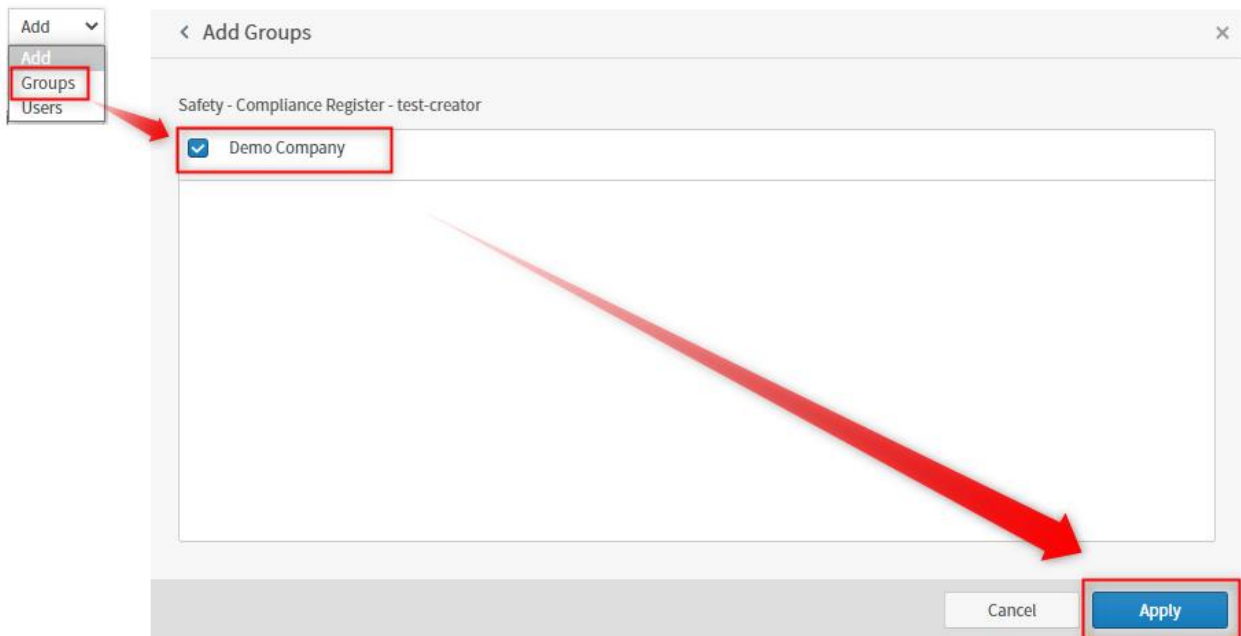


3. Search through the available dashboards and click the “**Share**” button corresponding to the item you want to socialise.
  - A. **Search** – You can type in the name of the dashboard you want to share.
  - B. **List** – List of the available dashboards.
  - C. **Share** – Share button.

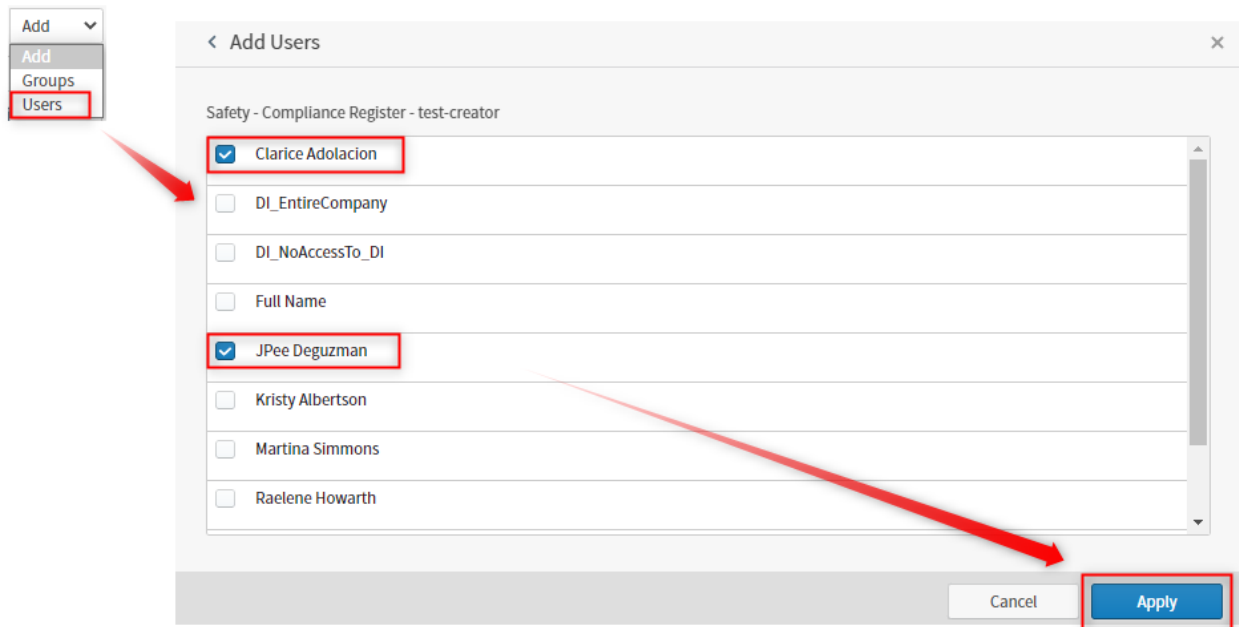


4. From the drop-down menu, choose “Group” or “Users”.

- **Group** – All users of your organisation are automatically assigned to the client group. Select a group from the list, tick the required group then click “Apply”.




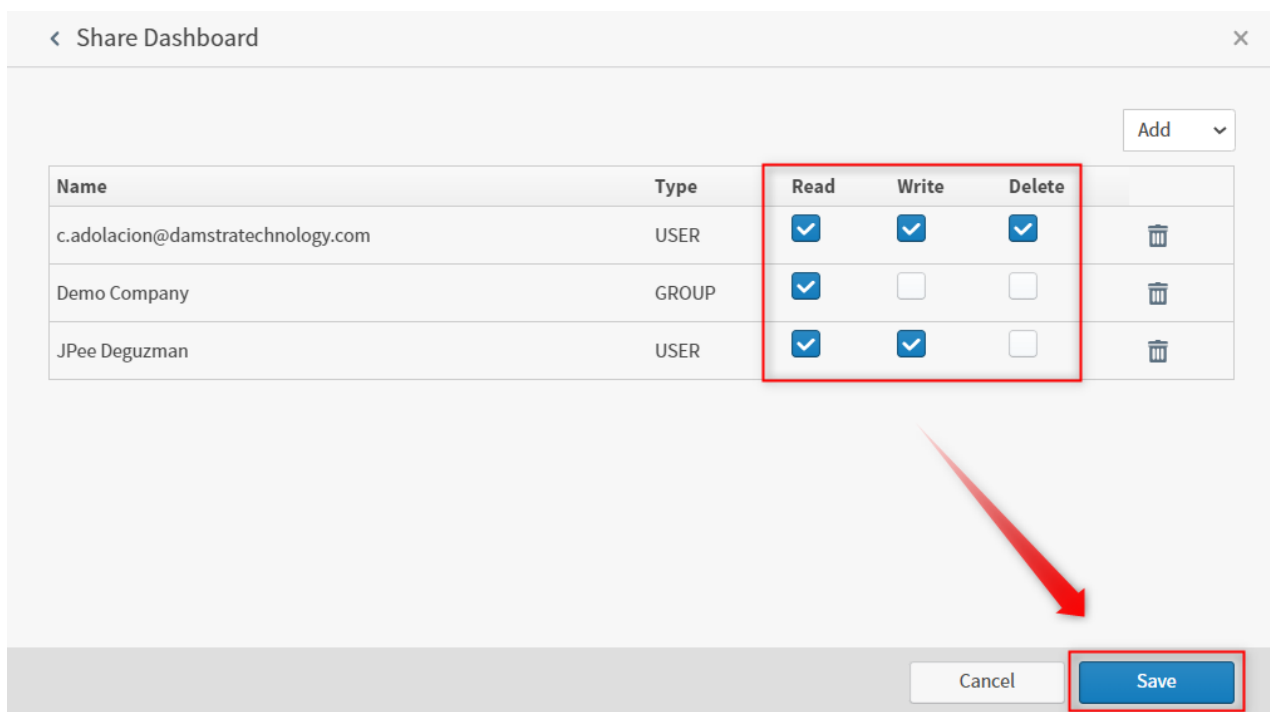
- **Users** – Select users from your organisation. Once you have chosen the required people then click “Apply”.



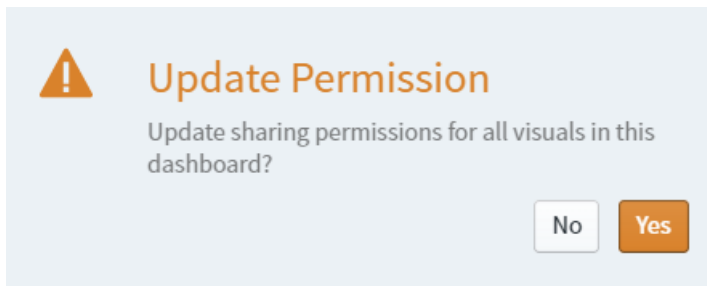
5. Set the group/user access to the dashboard by ticking the access you want to give.

- **Read** – Group/User will only have Read access to the dashboard.
- **Write** – Group/User will have the ability to edit the dashboard.
- **Delete** – Group/User will have the ability to delete the dashboard.

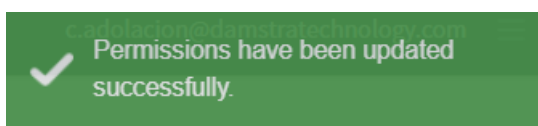
Clear all check boxes OR use the  icon to remove a user or group's access. When ready, click the "Save" button.



6. **Update Permission** will pop-up. Selecting “**Yes**” will commit your sharing options on the dashboard and all child visuals in the dashboard. “**No**” will just save the sharing options on the dashboard only (no child visuals will be updated).



7. A pop-up screen will appear once sharing is completed.



**Note:** “**Sharing**” is the precursor for **Scheduling a Report** feature. This will ensure that the recipients of the reports that you are scheduling have access to those reports. To schedule a dashboard with a group or user/s, please refer to this article <https://damstra.zendesk.com/hc/en-us/articles/11208709361049-Scheduled-Dashboard-Reports>