Manage Dashboard Sharing

If you are an administrator, you can easily share your dashboards with other users. These users have viewing rights only. In addition to setting this up when you create it, you can share an existing dashboard.

Administrators use this feature to share configured boards with the appropriate users based on role, division type, or division. Depending on your role, you may have access to only some of these sharing options.

You can also remove shares from your dashboards. When you do, those roles and users no longer have access to it.

To share a dashboard

1. Click the **Dashboard** tab.
2. Choose the appropriate dashboard from **Current Dashboard**.
3. Click **Save**. The *Save Dashboard* window opens.
4. To share by role:
    a. Select **Role** in the first **Add Share** drop-down list.
    b. Select the role in the second drop-down list.
    c. Click **Add**.
    d. Repeat these steps for each additional role.
5. To share by division type and role:
    a. Select **Division Type** in the first **Add Share** drop-down list.
    b. Select the type in the second drop-down list.
    c. Select the role in the third list.
    d. Click **Add**.
    e. Repeat these steps for each additional division type and role.
6. To share by division and role:
    a. Select **Division** in the first **Add Share** drop-down list.
    b. Select the provider (division) in the second drop-down list.
    c. Select the role in the third list.
    d. Click **Add**.
    e. Repeat these steps for each additional division and role.
7. Click **Save**.

To remove a dashboard share

1. Click the **Dashboard** tab.
2. Choose the appropriate dashboard from **Current Dashboard**.
3. Click **Save**. The *Save Dashboard* window opens.
4. Click the remove icon to the left of the share option.
5. Repeat these steps for any other share options you want to remove.
6. Click **Save**.