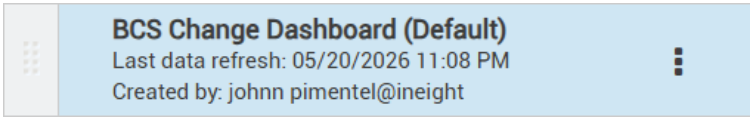
QUICKGUIDE

SHARING & COLLABORATION

InEight EXPLORE

SET A DASHBOARD AS YOUR DEFAULT

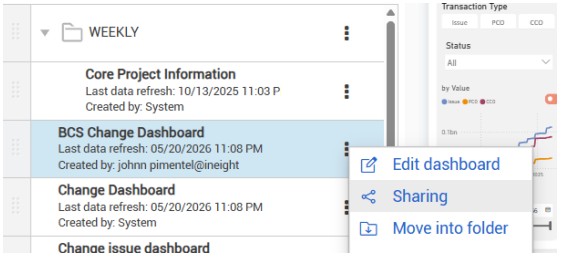
1. From your desired dashboard, click on the **three-dot ellipsis**.
2. Click **Set as default**.
   - The term “Default” will now appear next to the Dashboard name



COLLABORATE ON A DASHBOARD

Collaboration goes beyond sharing, by granting the recipient of the shared dashboard the permission to collaborate on and edit the dashboard.

1. Return to an existing shared dashboard and click the **Sharing** icon.



2. For any existing or new users click the **Can Edit** checkbox.
3. Click **Share**.

   NOTE: Remove the sharing option on an existing dashboard by clicking **Remove all sharing**.

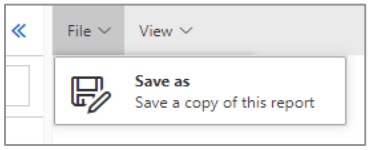
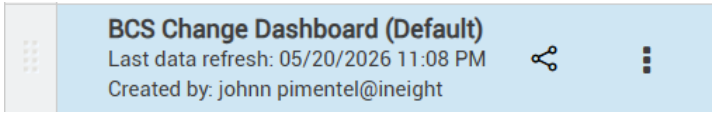
NOTE: When a dashboard is shared with you with "edit" permission, and after you have made your own changes, you can click SAVE and the dashboard will be overwritten.

You cannot overwrite original Explore dashboards – you will need to save your own copy.

SHARE A CUSTOM DASHBOARD

Used to save time and energy when individuals have similar data needs, though the recipient of the shared dashboard cannot edit it.

1. With your default dashboard selected, click the **three-dot ellipsis**, and select **Edit dashboard**.
2. Modify any dashboard content, as desired.
3. Click **File** > **Save As**.



4. Type in a name for the dashboard and click **Save**.
5. Click the **three-dot ellipsis** and select **Sharing**.
6. Select who you would like to share the dashboard with. Options include, users, projects and organizations.
7. Click **Share**.
   - A black Share icon indicates a dashboard has been shared by you, and a blue Share icon indicates a dashboard is being shared with you