

# Share a Dashboard

When you share a Dashboard, you share a live link that reflects the most recently saved version and the latest available data. When someone views a shared Dashboard, they always see the most up-to-date version.

You do not need to be an administrator or the Dashboard owner to share saved Dashboards. Any user can share Dashboards based on their access level.

- **Creators** can share and manage access to dashboards they build.
- **Consumers and Stakeholders** can share dashboards they have access to, but cannot modify them.

You can share a dashboard from the list of dashboards on the main Dashboard page, or from the dashboard itself.

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## Before you share

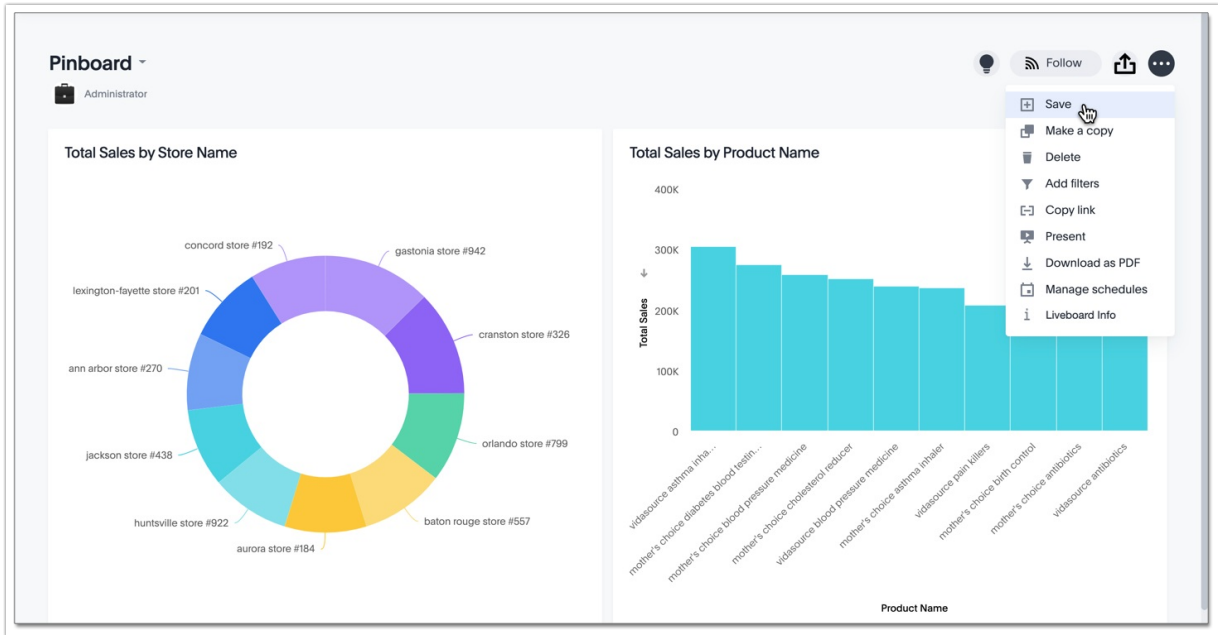
Keep the following in mind:

- **Dashboard access is controlled by Teams and sharing settings**  
Users will only see data available to their assigned **Team** unless additional data has been explicitly shared.
  - **Stakeholder users can access shared Dashboards**  
Stakeholders function as Consumer users and can view shared Dashboards. Interaction with dashboard data (such as filtering or drilling down) depends on access to the underlying dataset
  - **Login is required**  
All users—including Stakeholders—must log in to view shared Dashboards. Direct links will prompt users to log in before displaying the Dashboard.
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## Share from the Dashboards page

To share Dashboards from the main Dashboard page:

1. Configure the Dashboard(s) to appear as desired before sharing.
2. If you made changes, select **Save** in the top menu bar.



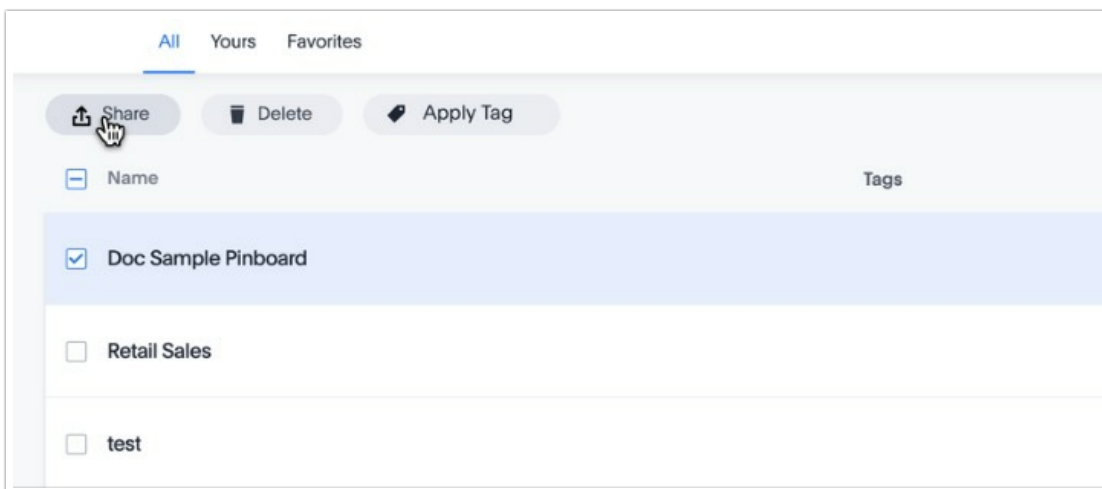
3. Select **Dashboards** from the top navigation.

4. Select the Dashboard(s) you want to share:

- Hover over the Dashboard name
- Select the checkbox that appears

To make your Dashboard discoverable to users in the same group, navigate to the **Yours** tab before selecting your Dashboard.

5. Select **Share**.



6. Specify permissions.

## Share from within a Dashboard

To share a Dashboard from within the Dashboard:

1. Configure the Dashboard as desired.
2. If you made changes, select **Save** in the top menu bar.
3. Select the share icon.



4. Specify permissions.

## Specify permissions

After selecting **Share**, the sharing dialog appears.

1. Enter the users or groups you want to share with.

- To remove access, select the X next to the user or group.

Note: You can only enter email addresses from allowed domains. Select the info icon to view allowed domains.

2. Select a permission level:

- **Can View** – Provides read-only access. Users can view and interact with the Dashboard based on their data access.
- **Can Edit** – Allows users to modify the Dashboard (rename, update, or delete).

3. Ensure access to underlying data:

- If a user does not have access to the underlying data, a warning icon will appear.
- Select the warning icon for details.

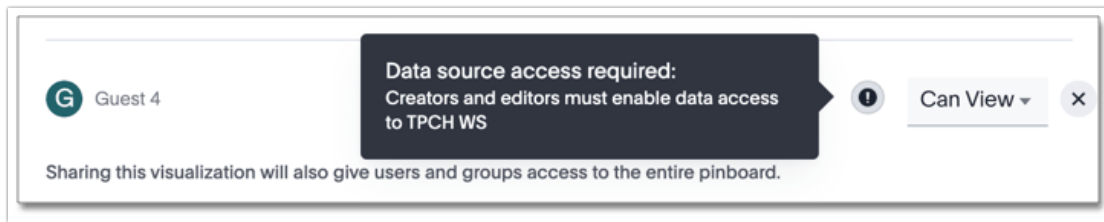
To grant access:

- Select **Give view access to underlying data sources** at the bottom of the dialog
- Expand the dropdown to review affected data sources

If you do not own the data source, Alchemer will notify the owner or an administrator to grant access.

Once access is granted, the warning icon changes to a green checkmark.

4. (Optional) Send an email notification with a custom message.



If you own the underlying data source, you can enable access through the sharing dialog. If you do not own the data source, Alchemer emails the owner of the data source or your administrator to ask them to share the data.

To enable access, select **Give view access to underlying data sources** at the bottom of the dialog. You can select the arrow to view the data sources.

After you enable access, the warning symbol turns into a green checkmark.

5. (Optional) Copy a direct link to the Dashboard, chart, or visualization:

- Select **Copy link**

**Important:** Copying a link does not grant access. You must share the Dashboard using the **Share** button.

6. Select **Share** to apply permissions.

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## Additional considerations for stakeholders

- Stakeholder users can access any Dashboard shared with them or available through their Team.
- Stakeholders can:
  - View dashboards (filtering and drill-down capabilities depend on dataset access)
  - Share and export Dashboards
  - Set alerts and receive scheduled notifications
- Stakeholders cannot:
  - Create, edit, or delete Dashboards
  - Manage data sources

If your account includes **Advanced Dashboard**, Stakeholders can also view AI-powered insights (such as AI Highlights) within shared Dashboards.

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## Accessing shared dashboards

Users can access shared Dashboards in the following ways:

- Log in at <https://clarity.alchemer.com> to go directly to Dashboard

- Use a shared link (login required)
- Navigate via the app launcher from Survey

Access to data within the Dashboard will always reflect:

- The user's **Team membership**, and
- Any **additional sharing permissions** granted

Related Articles

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