

Accessing a Dashboard from a 'Scheduled Dashboard' Email

Did you know that it is possible for the sender of a scheduled dashboard to configure the dashboard in a way that allows the recipient to simply click on an email link and be redirected to the dashboard in Insight?

Scheduling a Dashboard with a 'Dashboard Link'

1. To schedule a dashboard with a 'dashboard link', first single-click the 'Share' button in the upper right-hand corner:





2. When the 'Share' box opens, select the user you would like to share the dashboard with and 'subscribe him or her to emailed reports' by single-clicking the envelope icon to the right of the username:

Share: Daily Report Dashboard	20%. Doome			
Shannon Patterson shannon.patterson@m3as.com Jorge Nigrinis jorge.nigrinis@m3as.com	Owner 🖂 On Can View 🗸 🖾 On 🗊			
Users cannot change their subscription settings Subscribe All Unsubs Dashboard URL https://192.168.131.226/app/main#/dashboards/5e67858cc112bb4er				
	Save Cancel			

NOTE: As a Best Practice, M3 recommends sharing all dashboards in 'Can View' mode.

3. To set the dashboard schedule, single-click the envelope icon in the upper right-hand corner of the 'Share' box:

Share:	Daily Report Dashboard	<u>2</u> 2 <u>8</u>
S	Shannon Patterson shannon.patterson@m3as.com	Owner 🖂 On
J	Jorge Nigrinis jorge.nigrinis@m3as.com	Can View 🗸 🖂 On 🗐
te u	sers cannot change their subscription settings	Subscribe All Unsubscribe All
Dashb	sers cannot change their subscription settings board URL https://192.168.131.226/app/main4	Subscribe All Unsubscribe All #/dashboards/5e67858cc112bb4ed08583i



4. To ensure that the dashboard is sent with a 'dashboard link', select the 'Email Report' option:

mail Report Conte	at				
anali neport conte					
M Email Report					
D PDF Attachm	ent				
chedule					
Every ElastiCub	e update, no more tha	n 1	0 emails	per day	
Frequency	Every day	at	10:00 PM	Eastern Time (US	

NOTE: When your intention is for the recipient of the dashboard to click on the email link and access the dashboard in Insight, M3 recommends *not selecting the 'PDF Attachment' option*.

5. Select the frequency on which you'd like the dashboard to send, then single-click 'Republish' or 'Save' (depending on whether or not you have shared the dashboard before):

Republish: Daily Report Dashboard	2 <u>22</u>
Email Report Content	
🗹 Email Report	
DF Attachment	
Schedule	
O Every ElastiCube update, no more than 1	emails per day
Frequency Every day at 10	:00 PM Eastern Time (US
-	
Send me a report now	Republish Cancel



Accessing a Dashboard from a 'Scheduled Dashboard' Email

1. When you receive a 'Scheduled Dashboard' email that has been configured using the steps above, it will look like this:

Dashboard: Daily Report Dashboard As of Mar 25, 2020 5:30 PM	Λ			
M m3ac-pattersons <sisense-admin@sisense.com> To i) If there are problems with how this message is displayed, click here to view it in a web browser. Click here to download pictures. To belp protect your privacy. Outlook prevented automatic download</sisense-admin@sisense.com>	5	ج e pictur	\rightarrow	5:31 PM
Daily Report Dashboard				
ADR \$133.56 ADR vs LY				



2. When you hover over the image of the dashboard in the email, a link will pop up:

Dashboard: Daily Report Dashboard As of Mar 25, 2020 5:30	PM
M m3ac-pattersons <sisense-admin@sisense.com> To I If there are problems with how this message is displayed, click here to view it in a web browser. Click here to download pictures. To help protect your privacy, Outlook prevented automatic download percenter and the protect your privacy.</sisense-admin@sisense.com>	\leftarrow \Leftrightarrow \rightarrow \cdots 5:31 PM
Https://insight-staging.m3as.com/rijold/dashboard? gash= 5e291a23e9c8r727640d752 Citc or tap to follow link: ADR \$1333.566 ADR vs LY	



3. When you see the link pop up, click on the image of the dashboard!

You will be directed to the Insight login page, at which point you will enter your credentials and select 'Log In':





4. From there, you will be redirected to the dashboard in Insight:

