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Dynamic View: Manage Processes at Scale

Jeremy Lee
Sr. Customer Success Manager

By the end of today's session...

You will be able to:

- Navigate the Dynamic View app
- Create new views from existing sheets and reports
- Customize view display options and individual fields
- Manage sharing permissions

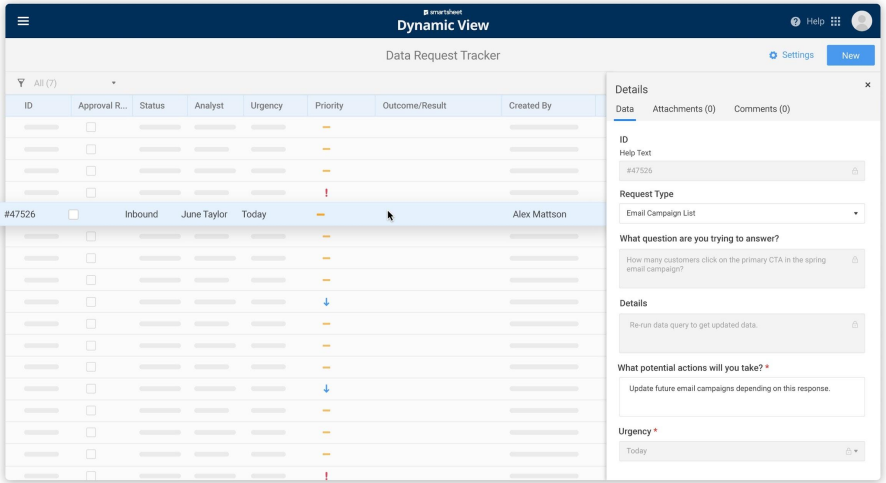
What is Dynamic View?

Dynamic View is a premium app that allows users to collaborate on a single set of data while maintaining confidentiality of specific fields.

Enables users to:

- Selectively share elements of work
- Establish logic to determine what can be seen/edited

smartsheet Dynamic View



Dynamic View uses include the following:

- Finance - Accounts payable management
- IT - Ticketing/request tracking
- Marketing - Creative services requests
- Operations - Engineering request management
- HR - Performance reviews
- Supply Chain - Vendor management

Who interacts with Dynamic View?

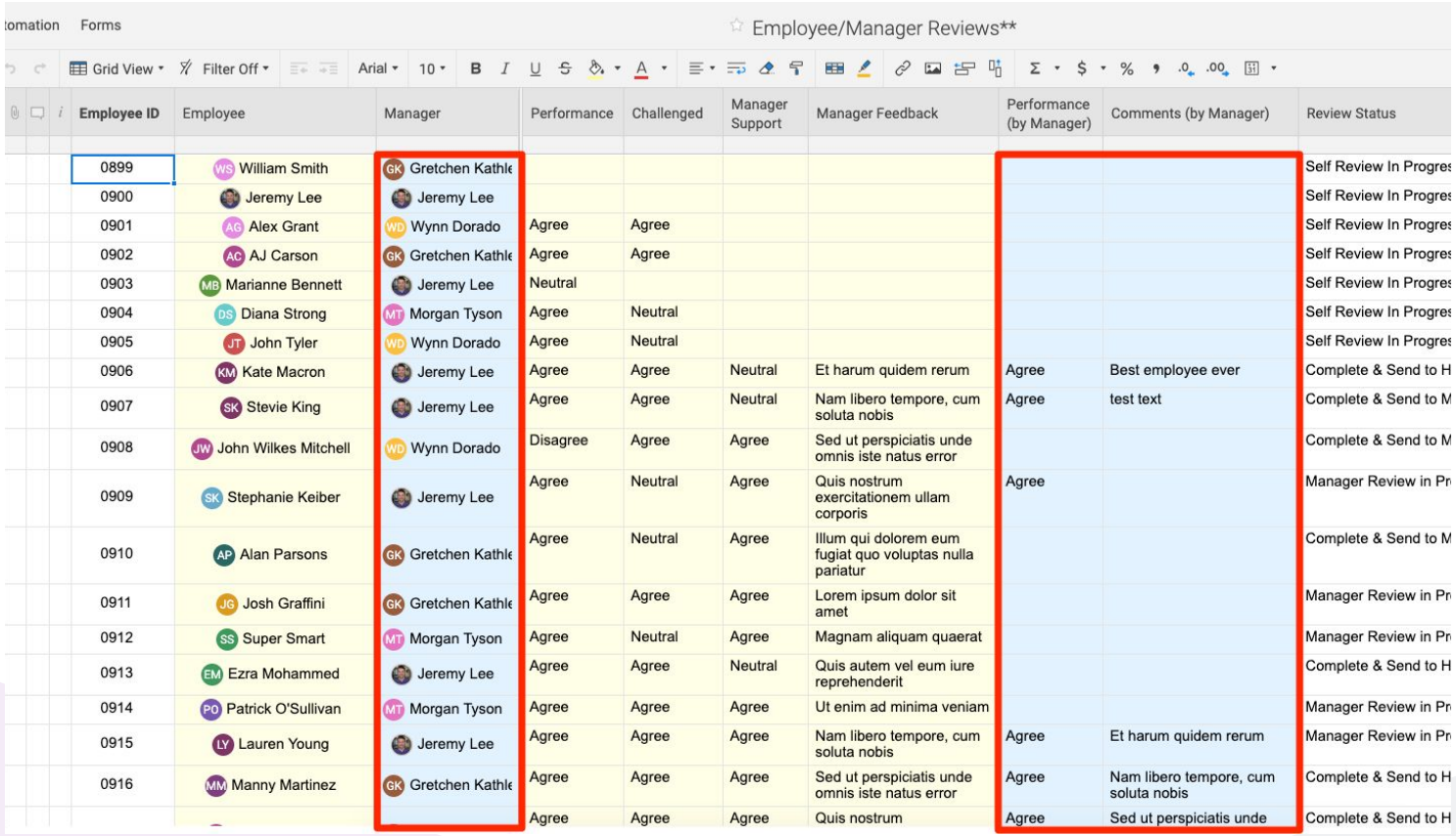
Administrators

- Configure views
- Establish logic to determine which fields can be seen/edited by specific users
- Must be shared to source sheet(s)/report(s)

Others who view/edit data

- Can view and/or source data (access determined by permissions set by admin)
- Do not need to be shared to source

First scenario: employee reviews



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Employee/Manager Reviews**

Grid View | Filter Off | Arial | 10

Employee ID	Employee	Manager	Performance	Challenged	Manager Support	Manager Feedback	Performance (by Manager)	Comments (by Manager)	Review Status
0899	William Smith	Gretchen Kathle							Self Review In Progres
0900	Jeremy Lee	Jeremy Lee							Self Review In Progres
0901	Alex Grant	Wynn Dorado	Agree	Agree					Self Review In Progres
0902	AJ Carson	Gretchen Kathle	Agree	Agree					Self Review In Progres
0903	Marianne Bennett	Jeremy Lee	Neutral						Self Review In Progres
0904	Diana Strong	Morgan Tyson	Agree	Neutral					Self Review In Progres
0905	John Tyler	Wynn Dorado	Agree	Neutral					Self Review In Progres
0906	Kate Macron	Jeremy Lee	Agree	Agree	Neutral	Et harum quidem rerum	Agree	Best employee ever	Complete & Send to H
0907	Stevie King	Jeremy Lee	Agree	Agree	Neutral	Nam libero tempore, cum soluta nobis	Agree	test text	Complete & Send to M
0908	John Wilkes Mitchell	Wynn Dorado	Disagree	Agree	Agree	Sed ut perspiciatis unde omnis iste natus error			Complete & Send to M
0909	Stephanie Keiber	Jeremy Lee	Agree	Neutral	Agree	Quis nostrum exercitationem ullam corporis	Agree		Manager Review in Pr
0910	Alan Parsons	Gretchen Kathle	Agree	Neutral	Agree	Illum qui dolorem eum fugiat quo voluptas nulla pariatur			Complete & Send to M
0911	Josh Graffini	Gretchen Kathle	Agree	Agree	Agree	Lorem ipsum dolor sit amet			Manager Review in Pr
0912	Super Smart	Morgan Tyson	Agree	Neutral	Agree	Magnam aliquam quaerat			Manager Review in Pr
0913	Ezra Mohammed	Jeremy Lee	Agree	Agree	Neutral	Quis autem vel eum iure reprehenderit			Complete & Send to H
0914	Patrick O'Sullivan	Morgan Tyson	Agree	Agree	Agree	Ut enim ad minima veniam			Manager Review in Pr
0915	Lauren Young	Jeremy Lee	Agree	Agree	Agree	Nam libero tempore, cum soluta nobis	Agree	Et harum quidem rerum	Manager Review in Pr
0916	Manny Martinez	Gretchen Kathle	Agree	Agree	Agree	Sed ut perspiciatis unde omnis iste natus error	Agree	Nam libero tempore, cum soluta nobis	Complete & Send to H
			Agree	Agree	Agree	Quis nostrum	Agree	Sed ut perspiciatis unde	Complete & Send to H

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What is a view?

This is what gets configured in Dynamic View to allow users to collaborate on selected fields.

In this scenario we need:

- A view for employees
- A view for managers
- Neither group will be shared to the sheet

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Let’s Go to Smartsheet!

Recap of today's session

We discussed in detail:

- Navigate the Dynamic View app
- Create new views from existing sheets and reports
- Customize view display options and individual fields
- Manage sharing permissions

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