



☑ smartsheet

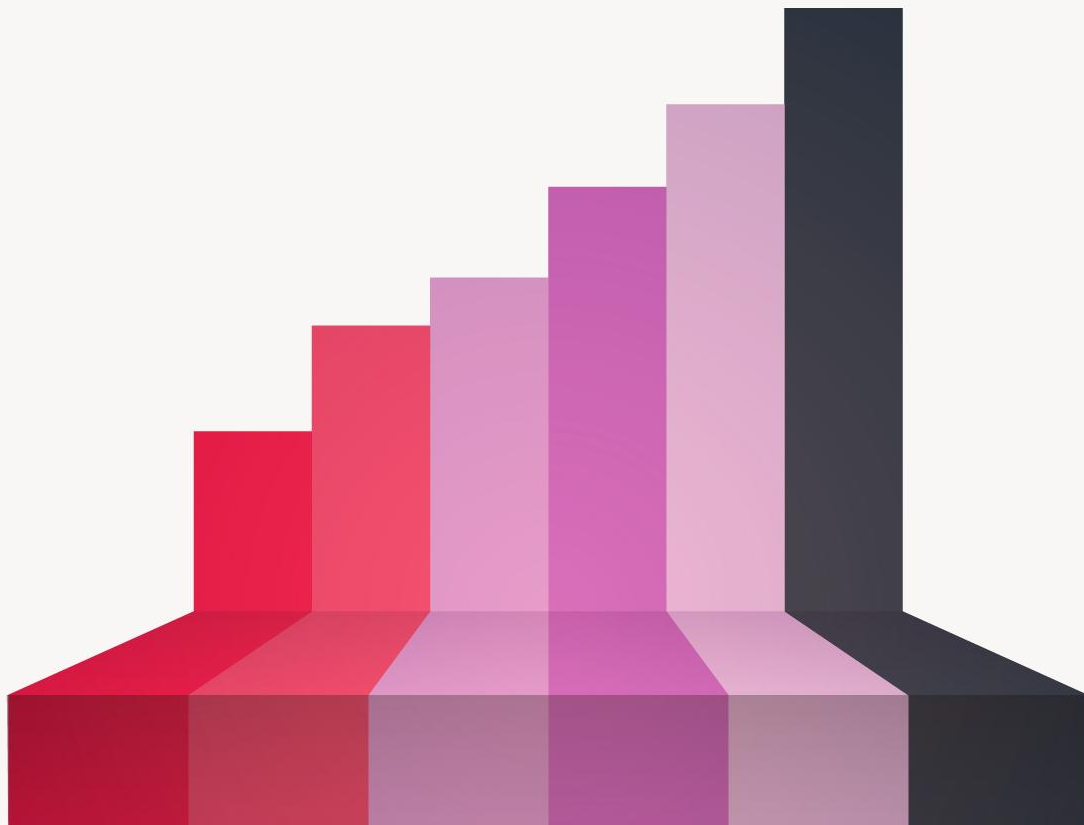


20 ENGAGE 20

How to Build a Ticket Intake Process That Actually Works

Derek Tellin and Elektra Helde

Smartsheet
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Hi there!



Derek Tellin
Business Solutions Analyst
Smartsheet



Elektra Helde
Sr. Product Marketing Manager
Smartsheet

Legal

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Learning objectives

1. Get a high-level overview of an end-to-end request management process using Smartsheet and premium solutions.
2. Learn best practices for request management.
3. Learn best practices for sheet security.

The problem

“Employees want to see their ticket progress. IT wants to be able to limit what each employee sees — and have a single master location where they can work all tickets.”

– Derek Tellin



Dynamic View

Share sections of your sheet or report without having to share the source item.

- Premium add on
- Securely shares only the information you want users to see from underlying sheets and reports
- Licensed sheet admins with access to Dynamic View can create new views

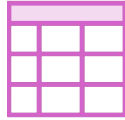
The screenshot displays the SmartSheet Dynamic View interface for a 'Data Request Tracker'. The main table has columns: ID, Approval R..., Status, Analyst, Urgency, Priority, Outcome/Result, and Created By. A row with ID #47526 is selected, showing it is 'Inbound', assigned to 'June Taylor', with 'Today' urgency, and created by 'Alex Mattson'. The right sidebar provides details for the selected row, including the ID, Request Type (Email Campaign List), and a section for potential actions like 'Update future email campaigns depending on this response'.

ID	Approval R...	Status	Analyst	Urgency	Priority	Outcome/Result	Created By
#47526		Inbound	June Taylor	Today			Alex Mattson

Helpdesk Ticketing Solution



Dynamic View



Request Sheet

Helpdesk Ticketing Solution



Dynamic View



Request Sheet



Update Request



Alerts & Reminders

Helpdesk Ticketing Solution



Dynamic View



Request Sheet



Satisfaction Survey

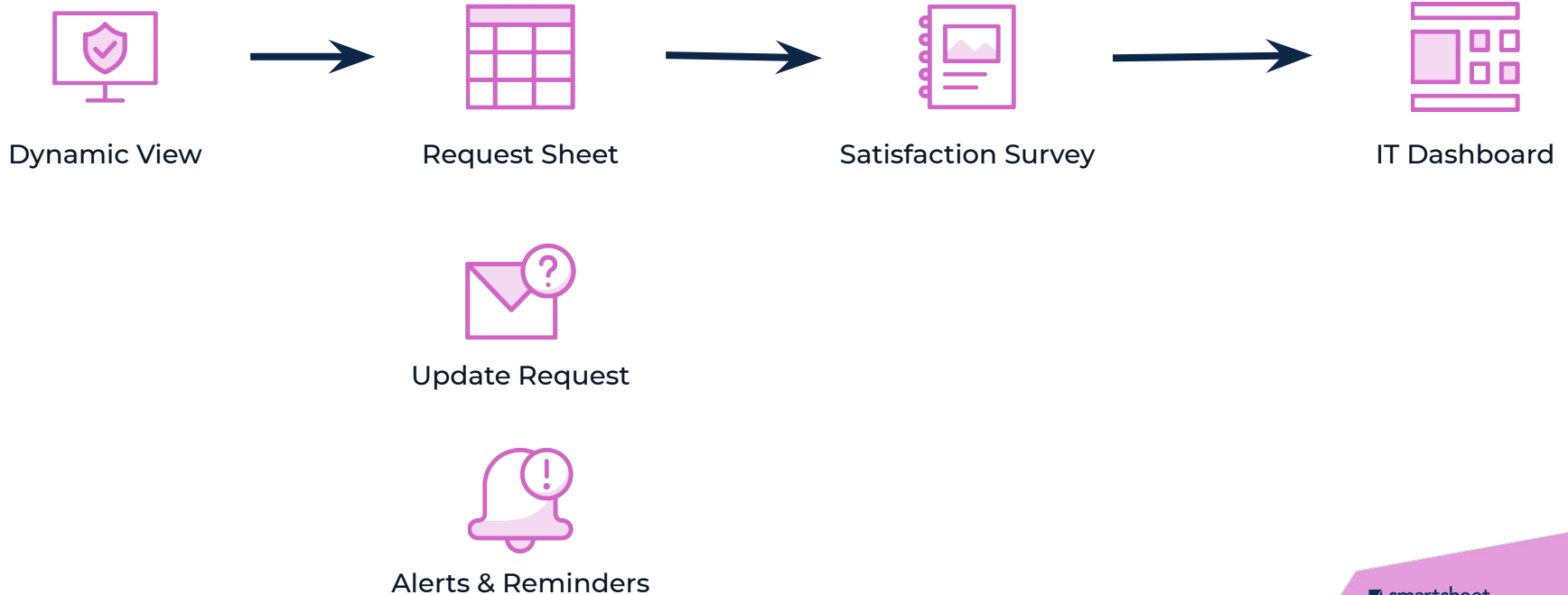


Update Request



Alerts & Reminders

Helpdesk Ticketing Solution



Demo



Additional resources

1. Learn all about [Dynamic View](#) in the Smartsheet Learning Center
2. Connect with [IT PMO Smartsheet users](#) in our Community
3. Dig into the ENGAGE Brain Boost for [Dynamic View](#)



**Thank
you**

Q&A



ENGAGE²2