

14BEG - Reporting and Dashboard Fundamentals

Top 20 Questions & Answers

- 1. Q: Is there a visual or some sort of diagram that shows the relationship and hierarchy of all these elements of Smartsheet (Workspace, portfolio, folder, sheets, reports, dashboards, etc.)?**

A: To learn more about the different objects in Smartsheet, please visit our Learning Center at help.smartsheet.com. I encourage you to check out also check out the “Getting Started with Smartsheet” session at Engage!
- 2. Q: When will the new Reporting features be available?**

A: The new features will be available later this month.
- 3. Q: Is there a limit to the number of Sheets that can be pulled into a report?**

A: There is no limit to the number of sheets that can be used in a report.
- 4. Q: Can cells be merged in a Report?**

A: Cells cannot be merged in a Sheet or Report.
- 5. Q: How can I share a report without sharing the underlying sheets?**

A: Reports can be Published and that link can be shared which will not require the sharing of the underlying sheets.
- 6. Q: If a sheet contains conditional formatting, is it possible to remove that formatting in the date that shows in the report?**

A: Yes, the report widget and metric widgets include a formatting button at the top, which allows you to choose whether underlying formatting is visible in the dashboard.
- 7. Q: Since the dashboard is visualizing live data from sheets and reports, is it possible to view older versions of a dashboard, after the data has been changed?**

A: No, dashboard data is live and is not archived

- 8. Q:Can you automate the report so that when you indicate complete it automatically updates % Complete to 100%?**
A:Yes, To do that you would need to build a formula on the underlying sheet
- 9. Q:How do you decide to use Report vs. Sheet to build a consolidation view?**
A:Reports bring together rows based on your criteria(Show all rows in project sheets that are in Red, for example) which is using cell links to create a roll up sheet allows you to add additional formulas to summarize the data. Reports are also bi-directional while cell links are one-direction.
- 10. Q: Is it possible to create a chart out of a report section?**
A:Charts are created in dashboards only, but can be based on data in a sheet or report.
- 11. Q:Can you export reports in Excel?**
A:Yes, you can export reports or sheets to Excel.
- 12. Q:Can I add a Smartsheet Form to a Dashboard?**
A: Yes, By using the Form's URL in a Web Content Widget you can add a Form directly to a Dashboard or Portal.
- 13. Q:Where do I find more information on dashboards?**
A:There are plenty of useful resources available on our Learning Center :
<https://help.smartsheet.com>.
- 14. Q:Is it possible to create dropdowns on dashboards that can filter out the underlying data that the end user sees?**
A: This feature is not available at this time.
- 15. Q:Can we bring data from, say Google Analytics into the reports or dashboards?**
A: If you were to download the Google Analytics into a CSV file you can import that into a sheet and create metric calculations that could be used in a Dashboard.
- 16. Q: Can you add annotations to any of the graphs on the dashboards?**
A: Not at this time
- 17. Q: Is there a limit to the number of widgets that can be on a dashboard?**
A: There is no limit to the number of Widgets.

18. Q: If you change something on a sheet would it then change automatically in the report?

A:Yes, sheets and reports are bi-directional, so changes in either would reflect in both and if the report is used in a dashboard the change would appear there also.

19. Q:Does the dashboard audience need to have a smartsheet license to just view it?

A:No, you can share dashboards (as viewers) with unlicensed users.

20. Q:Is it possible to copy a widget from one dashboard to another?

A: Yes, If both dashboards are open in the same browser you can right click on the widget and select Copy and then Paste it into the other dashboard.