smartsheet
ENGAGE22

# 26INT - From Intake to Archive: The Anatomy of a Complete Solution

## Top 20 Questions & Answers

1. **Q: Is there a way that when an approval request is sent to someone and they deny it, that the requestor can fix/update the request and submit the same request (rather than create a new one) so that it goes through the approval request again?**
   A: Yes! As part of the Decline path you can add an Update Request action that will allow the submitter to make corrections or provide more detail to resubmit.

2. **Q: What if you have multiple submitters? How can you manage this in a form without creating multiple columns?**
   A: Each form submission would only come from one individual. You can have a Contact List column that has multiple contacts and an Alert or Reminder would go to each person in that cell.

3. **Q: Can you explain the differences/advantages/disadvantages between Dynamic View and Reports?**
   A: Both are ways to have bi-directional interactions with the sheets. The main difference is Dynamic View does not require them to have any access to the sheets. Dynamic View is also a Premium Application and not part of the core sheet.

4. **Q: Can contact list column types be used in Forms and be retained as a contact list type in the sheet?**
   A: Yes, contact list columns can be used in Forms. Many times this will be used to collect email addresses so you can respond to the submitter or other individuals.

5. **Q: Would it be possible to pull from an HR software like Workday to like people to their managers without a Smartsheet in between?**
   A: Smartsheet has a number of integrations and our Open API that could be leveraged to connect to other applications.

6. **Q: How can we get training on formulas like Index Match?**
   A: You can find information on all of the Smartsheet Functions in our **help article**. You can also search in Solution Center for formulas to find a template with all of our functions and examples.

7. **Q: Are we going to be able to change or assign Display Text for a link in automation?**
   A: That isn't a current capability. However, we are hearing requests for it, and we are listening!

8. **Q: My report view does not have the filters that I just saw on Cicero's report - how can we get that?**
   A: This is a feature that will be coming soon.

9. **Q: How can I resend an approval request? My execs sometimes overlook an approval email and I need to resend it to them. An update request does not work because it doesn't allow them to approve from email, and they are too busy to be logging in to Smartsheet.**
   A: The best way to do that is to re-trigger the workflow in the approval request you want to resend, if there is the only one in the workflow, or the first one. If the approval request you want to resend is in the middle or bottom of a chain of approvals in a workflow, you can toggle the approval status (from Approved or Declined back to Submitted) of the /preceding/ approval request. Doing so will cause the approval request to be resent.

10. **Q: How do you sort Report rows by assigned, overdue, request?**
    A: This is a feature that is coming soon.

11. **Q: To share the reports, do we have to share the underlying grid as well?**
    A: Yes, when you share a report you must also share the underlying sheets that you wish to be visible to that person.

12. **Q: Can you just move some cells from a row to a new sheet?**
    A: You can create an automation that will copy a row but we can't move only certain cells at this time.

13. **Q: Does the approval process have plans to offer True / False / and Other? In our process, we have a need to select Approve, Decline, Need Board Review.**
    A: You can customize the approval requests button names from "Approve" and "Decline" to "true" and "false" or whatever you need.

    Re: your question about an "other" or 3rd option for approval request, we are hearing requests for this capability and we are listening! We don't have a timeline to share for when

this could arrive at this time. Thanks for sharing your input!

14. **Q: Is Smartsheet working on request approvals where the approver can edit selected fields like on update request?**
A: Great question! We are hearing requests for this capability and are bearing it in mind while prioritizing the roadmap. It is helpful if you share this request via our **Enhancement Request form** with context about how it would be helpful! Thanks!

15. **Q: What happens if a new manager replaces another? Will it trigger a bunch of emails?**
A: If managers change, the cells will all update but the action on past rows was already triggered so they will not resend. However, all new rows will go to the new manager.

16. **Q: Do you recommend using Dynamic View if you don't want technicians to access the entire "master sheet" that the reports pull from?**
A: Dynamic View is a great solution when you do not want to give people access to underlying sheets.

17. **Q: "Resubmitted" checkbox - what happens when it is resubmitted a second time? What is the trigger to kick off the request approval again?**
A: In the example it would only be able to go around once. You could create a second workflow or even more that would use different checkboxes like 2nd or 3rd submission. Or on the final decline, include a message saying they cannot resubmit.

18. **Q: What are some ways we can best communicate results with the requestor after requests have been processed?**
A: You could consider using automated alerts which send when changes occur on a request. Use the “Contact in a cell” recipient type to notify key stakeholders for that request about changes.

19. **Q: Without publishing a report, what is the best way to share a report with users WITHOUT sharing the underlying sheet with them?**
A: To share a report without publishing you would want to add it to a Dashboard using the Report Widget. This is like publishing so you do not have to share the underlying sheet.

20. **Q: Once you set up such a wonderful project, how would you copy the workflows to another sheet?**
A: You can reuse your workflows to new sheets by saving the sheet you built the workflows on as a new sheet or as a template.