

33ADV - Solution Building Best Practices

Top 20 Questions & Answers

- 1. Q: If you want a user to be able to edit (not just view) data on a given sheet within an app built from WorkApps, do they need access to that sheet?**

A: No, and that's one of the powerful capabilities of WorkApps! When you share a user to an app, they have the permission for each app page (sheet, report, etc) that is set by the builder based on the user's role in the app. The builder only needs to share access to the app, not any of the underlying sheets, dashboards, etc.
- 2. Q: So how it works is you start build WorkApps from an existing sheet, and that will provide user friendly capabilities for different roles/users?**

A: That's correct! You can build apps with WorkApps either from your existing Smartsheet solutions or from one of our off-the-shelf app templates. WorkApps is designed for you to be able to package together your entire program or process into one easy-to-use place for your stakeholders who use your solution every day. So all of the sheets, forms, dashboards, and even external content like training slides or metrics dashboards that make up your business program, you can create one easy to use app with roles tailored specifically for your end users.
- 3. Q: What security features are in place to keep my company information in an app safe?**

A: WorkApps comes with the same enterprise-grade security throughout all of Smartsheet. When you build an app with WorkApps, you can control which users see which app page in Editor or Viewer access, or hide it from specific roles altogether. Also you do not need to share embedded sheets or reports directly to end users so you can lock down the source more tightly.
- 4. Q: Can you include information in apps from different workspaces?**

A: Yes, you can embed sheets/reports/dashboards from different workspaces into a single app. In order to add an item as a page in an app, you must have owner or admin permissions to it in Smartsheet.

5. Q: Does each app have a unique URL or just generally does someone go to their WorkApps and

A: We provide an app gallery for you as an end user and builder to view all the apps shared to you and owned by you. Additionally, each app built has its own unique URL.

6. Q: Can you clarify the advantages of the WorkApps approach versus a dashboard?

A: WorkApps allows you to package your entire solution together into an easy-to-use app. Dashboards and WorkApps together make a powerful team! WorkApps also gives the app builder the ability to tailor roles for their users. So in WorkApps, you can create several roles for the users of your app - say an Executive, Program Manager, and Program Specialist - and when they go to the app, they can have a different experience (ie they would see different pages in the app). This is a key difference in capability that WorkApps offers that isn't available in dashboards.

7. Q: So you can give someone a read-only view in WorkApps. Can you also allow someone to edit some columns but not others within an App?

A: Currently the read-only setting (called Viewer in WorkApps) applies to the entire sheet, not individual columns. Dynamic View allows you to control access for specific columns and even specific cells, and you can incorporate Dynamic Views as external content pages in apps.

8. Q: Assuming this can be accessible via mobile, ipad, web browser?

A: Yes, WorkApps apps work great on mobile, web and tablets. You can find all of the apps you've built and been shared to in the WorkApps gallery on the Smartsheet mobile app.

9. Q: Do you have to make public / publish?

A: 'Publishing' an app in WorkApps does not make it public on the internet. Only those users you have specifically added will be able to see the app. WorkApps allow you to make edits to the app itself like adding or removing pages and then test those changes before you 'publish' the changes to your end users.

10. Q: How is WorkApps different than Dynamic View?

A: Dynamic View and Workapps are a great team. In WorkApps, like Dynamic View, you can give users read or edit access to sheets and reports without giving them access to the underlying sheet or report. With Dynamic view, you have even more control over what fields are available under what circumstances. Put them together and you've got a packaged solution with complete control.

11. Q: Can WorkApps embed a Dynamic View?

A: Yes. Using Dynamic View as an external content page in your apps you build in WorkApps is a powerful way to package your entire solution together.

12. Q: Where do you go to preview WorkApps?

A: You can learn more and sign up for the WorkApps preview at: <https://offers.smartsheet.com/workapps>

13. Q: Can you import existing sheets into a new workapp?

A: Yes, you can add any sheet, report, or dashboard you own or have admin access to.

14. Q: Will the current user filters work in WorkApps?

A: Yes. The app builder can select a default filter to be applied to the sheet, and if the app user has Editor access, they can switch between the sheet filters to drill down into the content they want to see.

15. Q: Do the same Tableau rules apply when adding it to the app?

A: Adding Tableau content in WorkApps functions similarly to adding WorkApps content in Smartsheet Dashboards. You can learn more about that here: <https://help.smartsheet.com/articles/2480561-embed-content-from-various-sources-in-a-dashboard>

16. Q: What are the requirements for the WorkApps preview period?

A: During the WorkApps preview period, licensed users on eligible plan types of Business, Enterprise, or Premier will be able to build and share apps once they have signed up for preview access. Learn more at www.smartsheet.com/workapps

17. Q: Is WorkApps included under the Enterprise plan?

A: During the WorkApps preview period, you can build and customize apps to meet your business needs, and then share them with your stakeholders. After the preview period ends, you will still own your underlying Smartsheet data — your sheets, reports, dashboards, and forms — that make up your solution. When WorkApps becomes generally available in early January 2021, it will continue to be available for customers on an Enterprise or Premier plan. Additional charges may apply for certain user types at that time.

18. Q: Is there a feature to automatically assign view access to the user? Or is the access assigned manually?

A: Yes. In the app you will define a 'role'. For each role you choose which pages that role sees, and what permissions they have. Then you assign users and groups to a role when you give them access to the app.

19. Q: I have a WorkApps question: I have an audit tracking solution that is going to be replicated for each new audit. Would the Work App configuration be part of the associated workspace for that audit? We don't have Control Center. Trying to figure out how you scale it.

A: Thank you for your question! In the scenario you describe, as you create each new audit, you would update your app to add the new audit as a page. WorkApps is meant to be adaptable so as your program needs change, you can add/remove pages quickly from apps and publish them to your users.

20. Q: I have access to the preview, where can I learn more about building apps using WorkApps?

A: Exciting! You can go to our learning center to learn more about building apps: <https://help.smartsheet.com/learning-track/smartsheet-advanced/workapps>